UNIVERSITÀ DELLA CALABRIA
DIPARTIMENTO DI SCIENZE AZIENDALI E GIURIDICHE

University of Calabria
Department of Business
Administration and Law (Italy)

State University of Moldova

International Academic
Research Center - USC

Universitas Sancti Cyrilli
A.D. 1669

REPUBLIKA E SHQIPËRISË
MINISTRIA E KULTURËS

Ministry of Culture (Albania)

7th Interdisciplinary International Conference

UNICART
INTERNATIONAL CONFERENCE
ACADEMIC RESEARCH & TOURISM

Web Conference

GAIA - People on a Journey

Environment, territories, hospitality and food cultures

Proceedings Book

19 - 21 October 2022,
State University of Moldova – Chișinău (Moldova)
Headquarter of Universitas Sancti Cyrilli (Malta)

I. Cekani, F. D. d'Ovidio
F. Favia, P. Iaquinta

ETQAsbl
2022

International Academic
Research Center - USC

UNICART

INTERNATIONAL CONFERENCE
ACADEMIC RESEARCH & TOURISM

GAIA - People on a Journey
Environment, territories, hospitality and food cultures

19 - 21 October 2022

Moldova State University, Chișinău (Republic of Moldova)
(Remote Opening Conference- Remote Sessions)

Universitas Sancti Cyrilli A.D. 1669, Valletta (Malta)
(Headquarter - Remote Sessions)

Proceedings Book

published by: **International Academic Research Center Str.**

Cekani I., d'Ovidio F. D., Favia F, Iaquinta P., eds. (2022). *Proceedings Book of the 7th UNICART International Conference "GAIA - People on a Journey. Environment, territories, hospitality and food cultures"*. 19 – 21 October, Moldova State University / Universitas Sancti Cyrilli A.D. 1669 (Malta). IARC-ETQA Publishers, Tirana-Bruxelles

ISBN 978-2-931089-30-9

Iris Cekani, Professor at the *Universitas Sancti Cyrilli A.D. 1669* (Malta), Co-Rector of the *International Academic Research Centre Str*. (Albania), Professor at the *University of Tirana* (Albania), Director of the *FMN Project for Eastern Europe*. Councilor of the Secretary General at the *Ministry of Internal Affairs*. Vice-Chairperson of the *Board NMC*. Prime Commissioner of the *KLN Ministry of Justice*.

Francesco D. d'Ovidio, Professor of *Social Statistics*, *Service Assessment Statistics* and *Sample Surveys* at the University of Bari *Aldo Moro* (Italy), Member of *AVA-ANVUR Committee* and reviewer for *VQR* (Italy), Member of the *Centre d'Etudes sur le Développement International et les Mouvements Economiques et Sociaux* (Paris, France), Member of the *International Academic Research Center Str*. (Tirana, Albania), Member of the *International Social Tourism Academy Italy/Albania.*

Francesco Favia, Professor of *Marketing and Tourism Organization*, Rector of the *International Academic Research Center Str*. (Tirana, Albania), Delegate of the *Universitas Sancti Cyrilli A.D. 1669* (Malta), President of the *International Social Tourism Academy Italy/Albania*, Member of the Directive Committee of *European Tourism Quality Association* (Bruxelles, Belgium).

Pietro Iaquinta, Adjunct professor of *Demography*, *Tourism Statistics* and *Legal Demography* at the University of Calabria (Italy), and *Medical Statistics* at the University of Bari. President of the *Technical Committee of Road Safety of the Puglia Region*, member of the *National Road Safety Council* at the CNEL, head of the C.Re.M.S.S (the *Road Safety Monitoring and Government Center of the Puglia Region*), Member of the *Centre d'Etudes sur le Développement International et les Mouvements Economiques et Sociaux* (Paris, France).

Final editing: Francesco D. d'Ovidio & Silvia d'Ovidio

Ἦ τοι μὲν πρώτιστα Χάος γένετ᾽, αὐτὰρ ἔπειτα
Γαῖ᾽ εὐρύστερνος, πάντων ἕδος ἀσφαλὲς αἰεὶ
ἀθανάτων, οἳ ἔχουσι κάρη νιφόεντος Ὀλύμπου…

Γαῖα δέ τοι πρῶτον μὲν ἐγείνατο ἶσον ἑ᾽ αὐτῇ
Οὐρανὸν ἀστερόενθ᾽, ἵνα μιν περὶ πάντα καλύπτοι,
ὄφρ᾽ εἴη μακάρεσσι θεοῖς ἕδος ἀσφαλὲς αἰεί.
Γείνατο δ᾽ Οὔρεα μακρά, θεῶν χαρίεντας ἐναύλους,
Νυμφέων, αἳ ναίουσιν ἀν᾽ οὔρεα βησσήεντα,
ἣ δὲ καὶ ἀτρύγετον πέλαγος τέκεν, οἴδματι θυῖον,
Πόντον, ἄτερ φιλότητος ἐφιμέρου.

Ησίοδο - Θεογονία (116-118, 126-132)

In truth at first Chaos came to be, but next
wide-bosomed Gaia (Earth), the ever-sure foundation of all
the immortals who hold the peaks of snowy Olympus…

And Gaia gave birth first, equal to herself,
the starry Uranus, to cover her on every side
and to be the seat of the blessed gods forever safe.
And she brought forth long Oros, graceful haunts of the goddess
Nymphs who dwell amongst the glens of the mountains,
but also the arid sea with his raging swell,
the Pontus, without the sweet union of love.

Hesiod – *Theogony* (116-118, 126-132)

Gaea – Magnus Gallery

Introduction and Information

The UNICART Scientific Conferences project started in 2019 as a cycle of itinerant meetings, so far limited to a number of southern European countries (Italy, Malta, Albania, Croatia, etc.). The project aimed to provide great opportunities for specialists, academics, students, and professionals, as well as for institutions that deal directly or indirectly with management, tourism and land development issues. All participants were invited to present their experiences, to share best practices, to provide detailed examples and recommendations on the proposed topics. Authors were encouraged to contribute to the conference by submitting their abstracts and research papers in constructive, empirical, experimental, or theoretical fields.

As planned, the ***7th UNICART Interdisciplinary International Conference*** took place from 19 to 21 October 2022: with its extension to EST. It was supposed to be held face-to-face in the charming capital of the Republic of Moldova, Chișinău, at the State University… but again, bad circumstances frustrate our projects.

The winds of war still blow in Europe and are spreading to the world.

GAIA suffers more and more. The environment in which man lives and acts is increasingly challenged by human choices.

Unfortunately, there are still no signs of a possible end to the war in Ukraine, and for this reason its harmful effects will last for a long time and a project for the sustainability of the creation and management of the most essential food resources will even be launched.

Tourism is also facing new crises and has to change its guidelines once again, and the dynamics of economic development open up new scenarios, not all of which are positive.

Tourism is also facing new crises and must change its guidelines once again. And the dynamics of economic development are opening up to new scenarios, not all of which are positive.

But, as anyone can see in the works presented in this book, there are many food for thought for new and more in-depth research because cultural and academic dynamics are also marking time. UNICART sets increasingly ambitious goals. Its intent is to increasingly break down the barriers to the circulation of ideas, cultural programs and research, always reminding us that ideas move upright and therefore together with people and nations.

In this view, UNICART is giving life to the NGO Magnum Symposium Universitatis (MaSU): an organization that wants to be a World Wide Campus in which prestigious teachers from various universities around the world create a single international pole of knowledge, offering students the possibility of having a vast, articulated, international, multicultural and multilingual educational offer, to study in presence and/or remote (e-learning platform) in "virtual classroom" and/or "virtual teacher" mode.

Students of the MaSU NGO organization will be able to attend university without limits of space, time and place. In fact, with MaSU Ong, the places of teaching are no longer just university classrooms, but also open spaces, museums, cultural centres, workplaces, student

 ISBN: 978-2-931089-30-9

houses, cyber-cafés. In any part of the world they can choose to study in English, French, Italian, Albanian, Greek, Romanian, or Arabic, in live and virtual mode, obtaining a degree recognized in Italy, in Europe and in all the countries belonging to the MaSU organization.

A dream come true: wherever the students or researchers are, without limits of space and time, they can attend universities and research centres.

The official presentation will be during the 2nd UNICARTourism, 22 and 23 April 2023 in Tirana (AL), where we are waiting for you for a Live Conference (but Remote Sessions will be organized anyway)

Coming back to the 7th UNICART Conference, the participants presented many interesting papers on various topics, which were explored in various ways. This Book collects the papers we received by the participants, grouped by topic in approximately the same order in which they were presented during the Conference: more than fourty papers that have been proposed by Authors from various countries of South-Eastern Europe but also from North Africa, and we are pleased to say that we were able to accept almost all of the interventions because they were consistent with the themes of the Conference.

Some small changes have been made to the Conference's order: first of all, the volume opens with the papers related to the session organized by our esteemed guests from the State University of Moldova, all of them on the topic of Tourism; then the most popular topics follow, starting with various aspects of tourism and culture or spirituality, that are food for the mind. After that, we find various papers on food for the body: a crucial topic in this period of hardship, where quantity may be lacking, but quality must be preserved as far as possible.

After that, we included all the papers on important topics: economy, sustainability, ecology, human rights, etc.; at the end of this review, you can find the Special Panel organized by FeNCO. The volume closes with some papers that appeared in the previous UNICART Conference, but not in the related Proceedings Book, due to the long time necessary for the Authors to complete their work.

As always, we wish to thank all the participants who shared their research and analyses, contributing with their work to the success of this seventh edition of the conference.

15/12/2022

Iris Cekani, Francesco D. d'Ovidio, Francesco Favia, Pietro Iaquinta

Programme Committee:

Iris F. CEKANI (Albania/Malta)
Francesco Domenico d'OVIDIO (Italy)
Francesco FAVIA (Albania/Malta)
Pietro IAQUINTA (Italy)

Organizing Committee:

Gianvico CAMISASCA (Italy)
Maurizio CARDANOBILE (Italy)
Giovanni A. COCCO (Italy)
Angela M. D'UGGENTO (Italy)
Paola DE SANTIS (Italy)
Najada FIRZA (Italy/Albania)
Roberto GALANTI (Italy/Rep. Moldova)
Maurizio MARCHETTI MORGANTI (Italy)
Riccardo MILICI (Italy/Liberia)
Maria G. ONORATI (Italy)
Massimo RUGGERO (Italy)
Francesco SASSONE (Italy)
Paolo SNIDERO (Italy/Belgium)
Mario STEFANELLI (Italy)
Skerdi SULOVARI (Albania)

Scientific Committee:

Maria Vittoria ALBINI (Italy)
Nunzio ANGIOLA (Italy)
Natalia ANTOCI (Republic of Moldova)
Laura ANTONUCCI (Italy)
Drita AVDYLI (Albania)
Piervito BIANCHI (Italy)
Giovanni BRONZETTI (Italy)
Veronica BULAT (Republic of Moldova)
Adriana BUZDUGAN (Republic of Moldova)
Irina CALUGAREANU (Republic of Moldova)
Maria Teresa CAPUTI JAMBRENGHI (Italy)
Maurizio CARDANOBILE (Italy)
Letizia CARRERA (Italy)
Iris CEKANI (Albania)
Eva CIPI (Albania)
Ubaldo COMITE (Italy)
Corrado CROCETTA (Italy)
Francesco D. D'OVIDIO (Italy)
Angela M. D'UGGENTO (Italy)
Alketa ELEZI (Albania)
Armelina FUSHEKATI LILA (Albania)
Loredana GIANI (Italy)
Maria HAMURARU (Republic of Moldova)
Holta HEBA ÇELA (Albania)
Elena HORSKA (Slovak Republic)
Kristal HYKAJ (Albania)
Annarita IACOPINO (Italy)
Pietro IAQUINTA (Italy)
Alma IDRIZI (Albania)
Orkida ILOLLARI (Albania)
Giovanna MASTRODONATO (Italy)
Peci NAQELLARI (Albania)
Maria G. ONORATI (Italy)
Antonella PERRI (Italy)
Tullio ROMITA (Italy)
Franco RUBINO (Italy)
Hysen SOGOJEVA (Kosovo)
Giovanni TOCCI (Italy)
Elisabetta VENEZIA (Italy)
Roland ZISI (Albania)

The Conference is organized in close collaboration among:

- International Academic Research Center, IARC, Tirana (Albania)
- Ismail Qemali University, Vlore (Albania)
- Universitas Sancti Cyrilli A.D. 1669, Valletta (Malta)
- Moldova State University, Chișinău (Republic of Moldova)
- Club for UNESCO, Genova-Metropolitan city (Italy)
- Ministry of Culture, Tirana (Albania)

 ISBN: 978-2-931089-30-9

Academic Partners:

- University of Bari "Aldo Moro" (Italy)
- University of Tuscia, Viterbo (Italy)
- European University of Rome (Italy)
- Giustino Fortunato University (Italy)
- SUA University, Nitra (Slovak).
- University of Dubrovnik (Croatia)
- University USHAF, Ferizaj (Kossovo)
- CIT (Canadian Institute of Technology), Tirana, Albania
- University of Medicine, Tirana (Albania)
- Guanajuato University (Mexico)
- American College of Management and Technology (Croatia)
- University College REALD (Albania)

Scientific Partners

- CIRPAS - Interuniversity Research Center "Population, Environment and Health" (Italy)
- CONSULMARC Sviluppo (Italy – Belgium)
- CREST - Tourism Research and Study Center (Italy)
- DHKN - National Chamber of Mediation (Albania)
- European Tourism Quality Association, Bruxelles (Belgium)

Institutional Partners

- World Diplomatic Cooperator NGO, Monrovia (Liberia)
- Honorary Consulate of the Republic of Moldova, Ascoli Piceno (Italy)
- Honorary Consulate of Republic of El Salvador
- Fe.N.C.O. Federation of Foreign Diplomats and Consuls in Italy

Patronages:

MINISTRIA E KULTURËS

ISBN: 978-2-931089-30-9

Ecotourism development strategies in terms of eco-brand clusters

Adriana BUZDUGAN*
State University of Moldova - Republic of Moldova

Abstract: The environment is a key factor in the success of the tourism industry. If we consider nature a product of the tourism industry, it is obvious that the product will no longer be purchased by consumers, if it starts to have a low quality. That is why all stakeholders in tourism should be aware of the importance of conserving the environment and natural resources. Hence the need to promote and stimulate the consumption of ecotourism. Tourism specialists attribute the emergence of alternative forms of tourism, such as sustainable tourism, cultural tourism, adventure tourism, ecotourism, etc., the significant negative impact of mass tourism on the environment, economy and socio-cultural elements of society. Among the forms of alternative tourism, ecotourism is distinguished as an option for mass tourism that leads to economic development using and protecting the natural resources of an area. Ecotourism combines the pleasure of discovering and learning about spectacular wildlife, flora and cultural sites with educational, environmental and local community benefits.
Ecotourism, which is properly designed and managed, leads to a balance between nature conservation and the need to develop tourism. Due to the growing demand, the eco-tourism market is becoming more and more diverse, so for businesses operating or seeking to operate in this market, the need to know the behavior of ecotourists is becoming increasingly important to "manage" more effectively both ecotourists and their experience.

Keywords: environment, ecotourism, sustainable tourism

JEL Classification: *Z32*

Ecotourism has become a popular form of travel for many tourists around the world. However, ecotourism is still an emerging type of travel that continues to spread across the globe and grow in popularity. In this context, we will present the concept of this type of tourism which is gaining more importance for research and various entrepreneurial projects every year.

From the 8 definitions presented in Table 1, we can draw the main pillars that make up this form of ecotourism, what is found in practically every definition is the natural area/air/space, a location untouched by human factors that is meant to remain intact and preserve the pure and pristine state of the environment. Analysing these concepts from various sources, the author proposes his own definition for ecotourism: ecotourism implies any type of activity practised responsibly by travellers (knowledge, discovery, awareness, exploitation, experimentation, observation, familiarisation) towards the sustainable development of the area together with the local people, flora and fauna of those areas and natural areas.

* Corresponding Author: adriana.buzdugan@usm.md

Table 1. *Different concepts of ecotourism*

Nr. d/o	Autor (i)	Ecotourism definition
1	International Ecotourism Society (TIES)[1]	responsible travel in natural areas that conserves the environment, supports the well-being of local people and involves interpretation and education
2	Australian Ecotourism Organisation [2]	sustainable ecotourism, with a primary focus on experiencing natural areas that foster understanding, appreciation and conservation of the environment and culture
3	Dictionary Cambridge Advanced Learner's & Thesaurus[3]	the business of organising holidays in places of natural beauty in a way that helps local people and does not harm the environment
4	The blog turtlefiji.com[4]	- responsible travel - tourism that focuses on environmental and local community awareness
5	Ceballos-Lascurain	tourism involving travel to relatively unspoilt or uncontaminated natural areas for the specific purpose of studying, admiring and enjoying the landscape and its plants and wildlife
6	Puiu Nistoreanu [5]	a form of tourism carried out in natural areas, the aim of which is knowledge and appreciation of local nature and culture, involving conservation measures and active involvement, generating benefits for the local population
7	Law on the organization and conduct of tourism activity in the Republic of Moldova[6]	a form of tourism geared towards nature knowledge and conservation
8	National Russian Standard „Tourism services. Ecological tourism/nature tourism. General requirements”[7]	Travel management activities that include all forms of nature tourism, where the main motivation of tourists is to observe and become familiar with nature while trying to conserve it.

Source: developed by author

Internationally there are organisations that support and promote the practice of ecotourism. According to the Discover Corps[8] protality whose mission is to inspire travelers to become advocates for our planet's natural wonders, cultural treasures and local communities through immersive and sustainable purposeful vacations, a 2015 "World's Best Responsible Travel Organizations" ranking was created[9].

[1] https://ecotourism.org/what-is-ecotourism/
[2] https://www.ecotourism.org.au/
[3] https://dictionary.cambridge.org/dictionary/english/ecotourism
[4] https://www.turtlefiji.com/what-is-ecotourism/
[5] Puiu Nistoreanu & colectiv – Ecoturism și turism rural, Editura ASE, Bucureşti, 2003, pg.76
[6] Legea Nr. 352 din 24-11-2006 cu privire la organizarea şi desfăşurarea activităţii turistice în Republica Moldova. Publicat: 02-02-2007 în Monitorul Oficial Nr. 14-17 art. 40
[7] https://docs.cntd.ru/document/1200124943
[8] https://discovercorps.com/about/our-philosophy/
[9] https://discovercorps.com/blog/best-responsible-travel-organizations/

Table 2. *Top 10 organizations promoting responsible tourism*

Nr d/o	Name of the organisation	Mission of the organisation
1	Centre for Responsible Travel[10] CREST was founded in 2003	The Centre's goal is to spread ethical tourism practices and policies around the world so that local communities can prosper and manage their biological variety and cultural resources.
2	Destination Management Centre Expanding the work of the National Geographic Center for Sustainable Destinations [11]	Created to assist intelligently managed tourism and knowledgeable destination stewardship in order to aid in the protection of the world's unique places.
3	Ethical Traveller A project of the Earth Island Institute in San Francisco, Ethical Traveler was founded by author/journalist Jeff Greenwald[12]	Nonprofit organization aiming to harness the economic impact of tourism to safeguard the environment and human rights.
4	Global Ecotourism Network [13] Was founded in early 2015 by a group of ecotourism professionals from around the world	In order to strengthen the ecotourism sector, provide thought leadership and advocacy, and promote authenticity and innovation, their ultimate goal is to bring together the many national and regional ecotourism associations, destinations, indigenous peoples, tour operators, professionals, and academics from around the world.
5	Global Council for Sustainable Tourism [14]	Promote understanding, adoption, and increasing demand for sustainable tourism practices to function as a change agent in the field of sustainable travel and tourism.
6	International Ecotourism Society Founded in 1990 by Megan Epler Wood, the world's first NGO dedicated to ecotourism as a tool for conservation and sustainable development [15]	Eco-lodges, communities, conservation programs, and professionals from the sustainable travel sector are brought together by the organization to create an ecotourism infrastructure based on economic, social, and environmental sustainability.
7	International Initiative for Sustainable Tourism Part of Harvard University's Center for Global Health and Environment [16]	Concentrates on innovative policy in the growth of tourism, sustainable and healthy food supply chains for tourism, and sophisticated tools for destination management and climate change readiness.
8	Long-term initiative The Zeitz Foundation's flagship initiative was launched in 2009[17]	Aims to persuade a large number of people to embrace best practices for a sustainable future for all. Members of The Long Run consistently show how profit can and should coexist with healthy communities and productive ecosystems.

[10] https://www.responsibletravel.org/
[11] https://destinationcenter.org/
[12] https://ethicaltraveler.org/
[13] https://www.globalecotourismnetwork.org/
[14] https://www.gstcouncil.org/
[15] http://www.ecotourism.org/
[16] https://scholar.harvard.edu/sustainabletourism/home
[17] http://www.thelongrun.org/

Nr d/o	Name of the organisation	Mission of the organisation
9	Sustainable Travel International Founded in 2002 [18]	Protects the world's most vulnerable tourist locations and changes how tourism affects the environment and local communities.
10	United Nations World Tourism Organization Its origins date back to 1925, when the International Congress of Official Tourist Traffic Associations (ICOTT) was formed in the Netherlands.[19]	Has a strategy for fostering global peace, prosperity, human rights respect, and economic growth, particularly in reference to developing countries.

Source: developed by author

As ecotourism is the highest form of responsible tourism, these organizations have the obligation to promote and educate the community towards the practice of a harmless tourism that ensures a harmonious coexistence of the tourist with the locals, nature, flora and fauna of the area. Apart from organisations involved in promoting responsible tourism, a trend in the contemporary economy is the formation of tourism clusters, which are based on the principle of organising interest groups around social facilities. These geographical concentrations of companies, even if they compete with each other, find common interests and principles focused on a common objective, as in the case of ecotourism clusters - protecting and preserving the environment - providing tourist infrastructure.

The overall objectives of stakeholders in tourism product development, which are difficult to achieve by a single enterprise, include: ensuring high product quality throughout the value chain; building sustainable cooperation between industries and across sectors; reducing transaction costs; conducting research to adapt innovative products and activities to rapidly changing environmental and climatic conditions, consumer demands and regulatory requirements; and increasing the competitiveness of the destination in national and international markets.

The presence of common objectives and barriers, of which the limited financial, informational and organisational resources of the small enterprises that form the backbone of the tourism industry can be considered as the main ones, argue for the need to combine efforts and implement joint projects. Therefore, the cluster can be considered an organizational mechanism that achieves objectives, produces benefits, reduces environmental, economic and social costs. The objectives of cluster initiatives can be different depending on the type of economic system, the level of economic development of the country and the region where the cluster is located, the level of formation and efficiency of the regional innovation system, the size and stage of development of the cluster, the management mechanism.

The specific nature of the tourism industry is the overlapping interests of a large number of stakeholders, whose objectives may differ significantly and even conflict with each other. The main problem is the conflict between the long-term public objectives of protecting the PSOs and the short-term economic objectives of businesses. A cluster can become a tool for reconciling the strategic and current interests of the participants, which requires a thorough analysis of stakeholder objectives. The analysis of the system of objectives of successfully operating European tourism clusters, according to the European Cluster Cooperation Platform, has identified their main, most common objective: the creation of a viable tourism product, which will

[18] https://sustainabletravel.org/
[19] https://www.unwto.org/

ensure maximum sustainability of regional development and reliable resource efficiency. According to the European online hub for industrial clusters[20] with the initiative to strengthen the European economy through collaboration it can be specified that the European Union aims to develop a sustainable economy through the European Resource Efficiency Knowledge Centre (EREKt)[21]. This centre helps European companies, especially SMEs, to save resources (water, energy, waste) and engage in the circular economy and industrial symbiosis. EREK provides tools, information and business opportunities that demonstrate new and better ways to be resource efficient and benefit from circular economy business models that turn waste into assets.

Analysis of cluster initiatives up to 2003 shows that their objectives do not include the pure greening of enterprises. After 2013 in terms of the number of clusters, the "green" sector ranked fourth, after the IT, food and automotive clusters. The most common objectives of environmental or "green" clusters are: facilitating the transition of industrial sectors towards sustainable development through eco-innovation and saving resources. Environmental or 'green' clusters in tourism usually refer to clusters specialising in the development of different forms of natural or eco-tourism. It should be noted that there is a trend towards the development of ecotourism as one of the additional activities of other specialist 'green' clusters (forestry clusters, agricultural clusters, food industry clusters, etc.).

When using cluster initiatives as part of development strategies, many countries, regions and businesses achieve a high level of competitiveness by being attractive as tourist destinations and promise to develop economic growth potential. With the creation of tourism clusters, the region's economy is provided with a favourable climate for increased productivity, efficiency and success in the tourism and hospitality industry. Clustering contributes to expanding opportunities for innovative development, optimising interaction between different regional and national entities, between commercial and non-commercial sectors, between producers of goods and their consumers. With its help, it is possible to form the 'brand' of a tourist destination in order to increase the region's visibility and image in the external environment.

An important aspect in the branding of tourist destinations is the promotion of the principles of sustainable development, circular economy, traveller safety and environmental conservation. In this context, we can mention the advantage of ecotourism clusters that are labelled as environmentally, socially, culturally and community friendly brands.

The Ecolabel Index[22] provides data and guidance for strong eco-labelling choices and is the trusted and accessible information provider for the eco-label market. Ecolabel Index is a unique platform that collects and structures data on eco-labels globally, increasing transparency and helping buyers and sellers use them more effectively. According to the platform, 51 eco-labels are registered for the tourism industry.

These are from the hospitality, tourism services, leisure, recreation and other important sectors of the tourism industry.

These eco-labelling schemes aim at recognising environmentally friendly products or services. Another area that is important to the tourism sector are environmental and sustainability education and certification schemes that require those responsible for the type of membership to meet specific environmental or sustainability performance requirements. As we see in Table 3, there are also certifications in the hospitality industry that highlight hotels using only certified organic products.

[20] https://clustercollaboration.eu/
[21] https://clustercollaboration.eu/erek
[22] https://www.ecolabelindex.com/about/

Table 3. *Eco-labelling in the tourism industry*

Specific areas of the tourism industry	Eco labels - brands
Products and services	AENOR Medio Ambiente; Blue Angel; Carbon Neutral Product Certification; Carbon Reduction Label; Climatop; EU Ecolabel; Fair for Life; Good Shopping Guide Ethical Award; Green Seal; Green Tick; Nordic Ecolabel or "Swan"; SEE What You Are Buying Into; Österreichisches Umweltzeichen (Austrian Ecolabel);
Accommodation facilities	Audubon International; BIO Hotels; ECO certification; ibex fairstay
Country organisations promoting sustainability	B Corporation; Beluga; Carbon Neutral Certification; Earthsure; EcoLabel Luxembourg; EcoMark Africa; Ekologicky setrny vyrobek / Environmentally Friendly Product; Environmentally Friendly Label: Croatia; Estonian Ecotourism Quality Label; Green America's Green Business Certification; Green Certificate: Latvia; Green Crane: Ukraine; Green Tourism Business Scheme; Hungarian Ecolabel / Környezetbarát Termék Védjegy; Legambiente Turismo; LowCO2 Certification; Singapore Green Label Scheme (SGLS); Tunisia Ecolabel; Viabono;
Beaches and ports	Blue Flag
Tourism services	Calidad Galapagos; EarthCheck; Green Business Bureau; Green Globe Certification; Green Key; Green Key Eco-Rating Program; Green Leaf Eco Standard; International Eco Certification Program; Nature's Best Ecotourism; Sustainable Tourism Education Program (STEP); Vitality Leaf;
Restaurants	Certified Green Restaurant®
Holiday parks	David Bellamy Conservation Award

Source: Elaborated by the author based on https://www.ecolabelindex.com/ecolabels/?st=category,tourism

The objectives of most labelling schemes are to improve the quality of life by promoting environmental conservation and environmentally sustainable development. Programmes are initiated to stimulate interest in environmental issues in collaboration with government and government ministries, municipalities, companies and individuals. One positive aspect we see is the Blue Flag label, a mark awarded to over 5066 beaches and harbours in 60 countries in Europe, South Africa, Morocco, New Zealand, Canada and the Caribbean[23].

Analysing the official websites of the 8 ecotourism clusters in Table 4, we can specify the following brand strategies applied by them:

- Organisation of informative webinars with specific topics on the future of tourism;
- Good practices in applying the circular economy as an innovative factor in the tourism industry are presented;
- Reports on the impact of Covid-19 on the industry;
- Organisation of events dedicated to the first steps for tourism development in the region;
- Presentation of partners, associates, funded and ongoing projects;
- Presentation of statistical data, sector dynamics.

[23] https://www.blueflag.global/

Table 4. *Top ecotourism clusters in the European Union*

Cluster name	Location	Logo	Members
Bio Danubius Regional Cluster[24]	Romania: Bucharest-Ilfov		SME's: 18 Research organisations: 2
Clúster Marítimo Marino de Andalucía[25]	Spain: Andalusia		SME's: 40 Research organisations: 10
Cluster Montagne[26]	France: Auvergne-Rhône-Alpes		Large firms: 20 SME's: 168 Research organisations: 10
hospitality.brussels[27]	Belgium: Brussels Region		SME's: 71 Research organisations: 30
MARITIME CLUSTER OF BALEARIC ISLANDS[28]	Spain: Balearic Islands		SME's: 4
Thermal-Health Industrial Cluster[29]	Hungary: North Great Plain		Large firms: 1 SME's: 21 Research organisations: 1
TSAC - SUSTAINABLE TOURISM CLUSTER OF ARAGON[30]	Spain: Aragon		Large firms: 2 SME's: 21 Research organisations: 2
Turisfera - Cluster of Tourism Innovation of the Canary Islands[31]	Spain: Canary Islands		Large firms: 1 SME's: 17 Research organisations: 2

Source: Elaborated by the author based on ecotourism cluster websites

In conclusion we can mention that a well-developed cluster of related firms stimulates three important activities: increased productivity (through specialized production factors, access to information, synergies and access to public goods), faster innovation (through collaborative research and competitive effort) and creation of new firms (filling niches and expanding the boundaries of the cluster map).

Because clusters are constantly changing, they have the capacity to respond to constant market developments. Clusters help cities and regions focus their efforts on economic development and recruitment, encourage communities to refocus their efforts on existing industries, help

[24] https://biodanubius.ro/en/
[25] http://cmma.eu/
[26] https://www.cluster-montagne.com/
[27] https://hospitality.brussels/
[28] https://balearicmarinecluster.com/en/
[29] https://www.termalegeszsegipariklaszter.hu/?nyelv=en
[30] https://tsac.es/
[31] http://turisfera.org/

attract foreign investment. Local communities understand that the best way to develop their own and the region's economies is to support a cluster of businesses, rather than trying to attract businesses from outside. Responsible for implementing the clustering vision are chambers of commerce, business incubators and universities with research centres working with local business communities.

References

1. http://www.ecotourism.org/
2. http://www.thelongrun.org/
3. https://clustercollaboration.eu/
4. https://clustercollaboration.eu/erek
5. https://destinationcenter.org/
6. https://dictionary.cambridge.org/dictionary/english/ecotourism
7. https://discovercorps.com/about/our-philosophy/
8. https://discovercorps.com/blog/best-responsible-travel-organizations/
9. https://docs.cntd.ru/document/1200124943
10. https://ecotourism.org/what-is-ecotourism/
11. https://ethicaltraveler.org/
12. https://scholar.harvard.edu/sustainabletourism/home
13. https://sustainabletravel.org/
14. https://www.ecolabelindex.com/about/
15. https://www.ecotourism.org.au/
16. https://www.globalecotourismnetwork.org/
17. https://www.gstcouncil.org/
18. https://www.responsibletravel.org/
19. https://www.turtlefiji.com/what-is-ecotourism/
20. https://www.unwto.org/
21. Legea Nr. 352 din 24-11-2006 cu privire la organizarea şi desfăşurarea activităţii turistice în Republica Moldova. Publicat: 02-02-2007 în Monitorul Oficial Nr. 14-17 art. 40
22. Puiu Nistoreanu & colectiv – Ecoturism și turism rural, Editura ASE, București, 2003, pg.76

ISBN: 978-2-931089-30-9

Principles of Sustainability Applied in the Hotel Industry rrom Republic of Moldova

Veronica BULAT*
Moldova State University - Republic of Moldova

Abstract The results of the research on sustainability in the hospitality industry are growing rapidly and a number of research agendas are receiving attention, but rather than attempting to review all of the research projects, the present authors provide a selection of illustrative examples of the nature and range of works undertaken in this field. Supplying an introduction to a recent text on sustainability in the hospitality industry, it focuses on a number of key themes, including the designing of green hotel, minimizing energy consumption, the role of technological innovation in achieving sustainability, sustainable tourism, sustainable marketing for consumers and the method through which human resource management practices can contribute to sustainability. The environmental paradox of tourism is that tourism simultaneously seeks fragile and sensitive environmental resources as basic "ingredients" and attractive background for the production and consumption of tourism experiences.
The purpose of this research is to examine sustainability in the hotel industry from Republic of Moldova, presenting the Tulip Garden Residence hotel as a case study. The objectives of the research reside in the exploration of conceptual approaches regarding sustainability in the hotel industry; characterizing the theoretical aspects and principles of sustainability in the hotel industry; detecting the contradictions of sustainability in the development of the hotel industry; general description of the Tulip Garden Residence entity; analysis according to VRIO of existing resources within Tulip Garden Residence; studying the sustainable practices applied within the entity; researching the influence of sustainable practices applied within the hotel on consumer behavior; formulating recommendations according to new trends in sustainable practices.
The research methodology includes a set consisting of the sociological method, the historical method, the comparison method as well as induction, deduction and generalization.
The main results obtained consist in examining the results of worldwide research on consumer behavior towards responsible businesses; analysis of the influence of sustainable marketing on the consumer behavior of Tulip Garden Residence; formulating recommendations based on research results in order to promote sustainable development in the Republic of Moldova.

Keywords: international tourism; social responsibility; hotel industry; VIRO analysis.

JEL: *M14; M16;*

Introduction

A number of studies have also examined the nature of sustainability practices present in the hospitality industry. Upadhiai et.al. (2016), for example, has reviewed the methods and scope

* Corresponding Author: veronica.bulat@usm.md

of corporate social responsibility reporting by the world's top 150 hotel companies. They found that while a large number of the examined companies reported their connection to a wide range of sustainability issues, including environmental goals, environmental quality, diversity and accessibility, community well-being and economic prosperity, ”a much smaller number of them provide details of specific initiatives and even fewer of them report actual performance to be achieved”. They have also tried to assess the corporate social responsibility practices of 10 international hotel groups, and their research showed that corporate systems do not necessarily reflect actual operations and that "environmental performance is driven by savings, labor policies tend to conform to local legislation, socio-economic policies are inward-oriented, with little acceptance of the impact on the destination, and customer involvement is limited". Specifically, Kotler (2016), has developed a corporate sustainability reporting index that embraces both labor and human rights, health and safety, environmental and economic dimensions for the cruise industry, although their research suggests that “companies disclose more management data than performance” and often ”focus on indicators that are easy to imitate and demonstrate the position held”.

Discusion and results

The tourism industry has had a rapid evolution in the last decades. In addition to the positive effects of generating growth in the destination areas, there are also negative effects with an impact on areas such as the environment, culture, politics, social and economy. Sustainable development requires changes, including in terms of improving the relevance of accounting information, with the aim of increasing the satisfaction of its users with regard to the determination of specific environmental decisions, in order to achieve the established objectives (Kotler, 2016).

For a major part of the hospitality industry, the concept of sustainability represents an intriguing paradox. At the operational level, for example, on the one hand, the industry is increasingly looking to implement sustainability in both its marketing messages and customer experiences, while on the other hand, the main focus is often on the ordinary consumption, which in many ways is the antithesis of sustainability. The menu at The Hewlett Arms in Cheltenham advertises ”sustainably caught British fish battered with homemade tartar sauce and beaten peas”. At the same time, a travel magazine advertisement for the Gore Hotel in central London invites potential guests to ”be seduced by luxury in London”, while a newspaper advertisement for a Viking cruise offers the opportunity to ”sleep lightly in a comfortable king-size bed” and promises “whichever room you choose from the spacious Veranda rooms, so that you can enjoy ultimate comfort and style.

The whole concept of sustainability is based on three pillars which are called the Sustainability Triangle and continuously interact to ensure business performance and provide greater value to it:

Environmental sustainability - is the competence of the enterprise to manage natural resources, in order to increase their "life" and, of course, reduce and reuse the waste created. Simply put, it is the reduction of the negative impact of economic activity on the environment.

Social sustainability – involves human capital, inckuding the interactions, relationships, behavioral patterns and values of humanity.

Economic sustainability – the purpose of economic sustainability is to improve the quality of life through the profit generated.

The Limited Liability Company, Tulip Garden was registered in 2004 in the Republic of Moldova, then registered with the State Agency for Intellectual Property (AGEPI), Tulip Residence. The main type of activity is Hotel and other similar accommodation facilities. The

hotel wants to define the experience of the guests who enter their door and welcome them properly in Thai style, where the results offered rise above the height of expectations. Located in a suitable region of the city of Chisinau, the hotel provides all the necessary conditions for a memorable stay and ensures the desired comfort, so that the guest can enjoy a special experience, down to the smallest detail.

The hotel's vision and mission is to be a true oasis of relaxation for guests and to offer them a pleasant, unique experience worthy of repeating. The spacious and elegant rooms, the impeccable service and the friendly staff will charm you from the first moments spent there and will ensure that the choice was right. Hospitality, sophistication and sobrienty are what guide the hotel when it comes to the experience offered to each individual guest.

Tulip Garden Residence's VRIO analysis will look at each of its internal resources one by one to assess whether they provide a competitive advantage obtained. The VRIO analysis also mentions at each stage whether these resources could be improved so that to provide a greater competitive advantage.

To meet the VRIO analysis, a firm's resources must meet four criteria: high value, rarity, high cost of imitation, and good organization in order to capture the necessary value.

Valuable

- According to the VRIO analysis of the Tulip Garden Residence hotels, the dishes served with Thai specialties are a valuable resource because they are highly differentiated. This makes the perceived value for them by customers high. They are also valued more than the competition by customers due to the differentiation of these products.
- The VRIO analysis shows that Tulip Garden Residence employees are a valuable resource for the company. A significant part of the workforce is highly trained and this leads to more productive results for the organization. Employees are also loyal and retention levels for the organization are high. All this has an impact as a greater value for the final consumers of Tulip Garden Residence products.
- The VRIO analysis shows that the development at Tulip Garden Residence is not a valuable resource. There have been very few innovative features and innovative products in the last few years. Research and development is therefore a competitive disadvantage for Tulip Garden Residence. It is recommended that the development teams should be improved and costs should be reduced for them.

Rarity

- Local food products are not rare, they are easily supplied in the market by other competitors. This means that competitors can use these resources in the same way as Tulip Garden Residence and inhibit competitive advantage. This means that local food products result in competitive parity for Tulip Garden Residence. Because this resource is valuable, Tulip Garden Residence can continue to use this resource.
- Tulip Garden Residence employees are a rare resource as identified by the VRIO Analysis. These employees are highly trained and qualified. Better compensation and a better work environment ensure that these employees do not leave for other companies.
- According to the VRIO analysis of the Tulip Garden Residence hotel, financial resources are scarce. Strong financial resources are held by only a few companies in the industry.

Imitability

- Also, employees are not expensive to imitate, as identified by VRIO Analysis. This is because other firms can also train their employees to improve their skills. These companies can also hire employees from Tulip, offering better compensation packages, work environment, benefits, growth opportunities, etc. This makes Tulip Garden Residence employees a resource that provides a temporary competitive advantage. Competition may acquire them in the future.

- Local food products are not that expensive to imitate, as the VRIO analysis identified. They can also be acquired by competitors if they invest a significant amount in research and development of authentic Thai recipes. They also don't require years of experience. Therefore, Tulip Garden Residence's local food products give it a temporary competitive advantage that competitors can also gain in the long run.

Organizational Support

- Tulip Garden Residence's distribution network is organized as identified by the VRIO Analysis. Tulip uses this network to reach its customers, ensuring that products are available. Therefore, these resources prove to be a source of sustained competitive advantage for Tulip.
- Tulip Garden Residence's financial resources are organized to capture value as identified by the VRIO Analysis. These resources are used strategically to invest in the right places; capitalizing on opportunities and combating threats. Therefore, these resources prove to be a source of obtained competitive advantage for Tulip Garden Residence.

Below is exemplified how Tulip meets the four criteria: valuable, rare, expensive to imitate, and organized to capture value.

Table 1. *VRIO analysis of the entity Tulip Garden Residence*

Resources/ Abilities	Value	Rarity	Autheticity	Organizational Support	Competitive Advantage
Free WiFi	+	-	-	-	Competitive Equality
Variety of chambers	+	-	-	-	
Conference room	+	+	-	+	Short-term competitive advantage
High quality services	+	+	-	+	
Nearby activities	+	+	-	+	
Customer experience	+	+	+	+	Long-term competitive advantage
Sustenability program	+	+	+	+	
Thai massage by native masseurs	+	+	+	+	
SPA center	+	+	+	+	
Attractive offers on website	+	+	+	+	
Location	+	+	+	+	
Organizational culture	+	+	+	+	
Decor/Design	+	+	+	+	

Source: Elaborated by the author

Analyzing Tulip Garden Residence Hotel's resources through VRIO analysis, it was possibile to identify that most of their products and competencies give them a long-term competitive advantage. The main asset of the hotel, which is the rooms and some standard services, gives the hotel a competitive parity. However, their meeting space (size, views,

location), high quality of service and locations are also a plus. Many hotels have beautiful views and international flair. Which means those resources give them a short-term competitive advantage according to VRIO's analysis.

Sustainability has proven to be the business key to sustainable development. Tulip Residence applied sustainable strategies with the launch of its business, so now it is collecting the benefits and applying other campaigns with long-lasting effect in order to meet the growing needs.

The recycling system is organized in partnership with ABS Recycling Moldova by placing separate bins for the collection of paper, plastic and organic waste. Each bin is marked with its destination to facilitate the consumer's experience and reduce situations of uncertainty, which are an obstacle for the guest's contact with them. The bins are located at the take away table, the place where customers top off their drinks with sugar or additives, just as they exit the hotel. Being placed in a visible place, the company aimed to remind guests of the possibility of recycling and to imprint this chance in their memory. A few bins are also placed behind the barista counter to help change the team's habits. The collected waste is transported to the recycling plant in Chisinau.

The commercialization of ecological products is also a practice specific to sustainable marketing within the enterprise. On the shelves of products for sale, consumers can find ecological products such as eco mugs with bamboo fibers, cotton straws, eco bags and recently „avoska", known as string bag. The products can belong to both the brand and local producers. By concluding a collaboration contract, each producer of organic products can market their products in the lobby, thus Tulip Garden Residence supports local producers with sustainable business initiatives.

The collection of plastic for further reuse is carried out in partnership with TEP (Youth for Eco Plastic), the organization that aims to capitalize on used plastic of type 2 and 5. In 2019, Tulip Garden Residence joined the initiative of these ambitious young people by collecting and donating the two types of plastic. Therefore, the HDPE lids and PP crates are taken over by TEP once a month from each hotel and transformed into new products.

All these practices contribute to brand recognition and the creation of a sustainable image. In light of the above, these practices are a long-term investment that contributes to brand recognition, not only for the community, suppliers or competition, but also for potential consumers and employees. Without any doubt, green marketing influences consumer behavior, so they prefer responsible businesses that contribute to the well-being of the environment and society over those with an unsatisfactory reputation.

Conclusions

The plastic products that are used in the hotel and can be replaced are: straws, take away cutlery, bottled water, glasses. An alternative to plastic straws can be those made of stainless steel, bamboo or paper, the last two options can be composted, while the stainless steel ones can be reused. The take away cutlery, which is included in orders for delivery, can also be replaced with bamboo cutlery. Similar to these practices, water bottled in plastic bottles can also be replaced with water bottled in glass bottles. Thus, by choosing sustainable suppliers, an impact will be created at the enterprise level and their adaptation to current requirements. And the last proposed alternative is to replace the paper cups, which contain a layer of non-recyclable plastic on the inside to make them waterproof, with the edible ones of the domestic manufacturer Wayris or the kraft cardboard ones. In the hot season, the hotel needs to allocate more resources from the marketing budget to carry out effective promotion and cope with the increasing demand when the flow of tourists is higher and the competitors are more alarmed.

Acknowledgment
Research and Innovation Project: ”Strengthening sustainable public procurement in the Republic of Moldova” 20.80009.7007.15, financed from the state budget within the State program 2020-2023.

References

1. Kotler P. Marketing for Hospitality and Tourism. Chicago: Pearson, 2016, 688 p.
2. Kotler P. Principles of Marketing. Chicago: Pearson, 2017, 736 p.
3. Upadhiai A., Pomponi F., Vadam C., Sustenability in Hotel Industry., In book: Logistics, Supply Chain and Operations Management Case Study Collection. Chapter 7. Publisher: Kogan Page. Editors: David B. Grant. 2016.
4. INFOBASE S.R.L. TULIP RESIDENCE GARDEN https://www.data2b.md/ro/companies/1004601001775/societatea-cu-raspundere-limitata-tulip-garden?fbclid=IwAR3iPlXg3946xDvhakuB-0ZZFO35PURG2nHILClFJVBTmMi75D3zGxPc4Qo

ISBN: 978-2-931089-30-9

Synergic Aspects Regarding the Development of Educational Tourism in the Republic of Moldova

Maria HĂMURARU*
Moldova State University - Republic of Moldova

Abstract: At a worldwide level, for the better half of a century, tourism has been the only sector of economic activity that has had an almost uninterrupted development, notwithstanding some occasional shocks, extending and diversifying itself, as well as becoming one of the sectors with the rapidest growth.
In the case of the Republic of Moldova, the tourism industry is important for the benefits it provides and its activity role that creates demands and growth for other 23 related industries, offering a substantial level of evolvement of the actors. In this context, the expression and evolution of new forms of tourism calibrated to local potential and taken from the best international practices presents a challenge, yet an opportunity as well. The use of trips for educational purposes is popular on the tourism market, continuously growing.
In this sense, this work provided focuses on the research of educational tourism concept, its types and factors. Educational tourism involves the programmes that allow participants to travel to a certain location in an organised manner, the main goal being to get employed for the enlightenment experience, be it directly linked to the respective location, intended for professional specialisation and formation in certain fields or categories of interest. The premises for the development of educational tourism in the national economy are being researched, revealing: the function of 21 higher education institutions (13 – public, and 8 – private), the diverse use of interactive methods of teaching/learning/evaluation by the majority of teaching staff, the expansion of academic mobilities both at a high student level and teaching staff, the knowledge of several foreign languages by the young generation, the possession of a valuable cultural, religious, natural and anthropogenic potential. In this work there are highlighted the directions of the growth of educational tourism, that will contribute to the preservation of local culture and traditions.
Research methodology and methods. The subject of educational tourism has been studied by various researchers such as: Svetlana Selivanova, Timofeeva Elena, Alina Suslenco, Daniela Turcu, Janeta Weisz and others. In the process of developing the article, the following research methods were used: analysis of various sources (Erasmus+ annual reports, Elevate report, annual reports of the Moldova State University) study and generalization of internal and external practice on the subject, comparison and generalization of information.

Keywords: educational tourism, trip, cultural tourism, sustainable tourism.

Introduction.

The role of the tourism industry is constantly growing, which is associated with a significant level of its influence on the economy of a particular country. Currently, tourism is one of the modern tools for attracting the attention of external and internal consumers of tourism services,

* Corresponding Author: maria.hamuraru@usm.md

developing related industries, modernizing infrastructure facilities, increasing incomes, reducing unemployment among the able-bodied population, increasing the country's competitiveness and improving the level and quality of life of the population. Currently, the need to develop tourism in the Republic of Moldova is one of the strategic socio-economic tasks of the state.

The five tourist sector is significant for the Republic of Moldova due to the advantages it offers as well as the role it plays in generating demand and growth for 23 other associated industries, resulting in a high degree of stakeholder involvement. The testing and creation of new tourist forms that are tailored to the local potential and drawn from the finest global practices constitute a challenge but also an opportunity in this context.

The aim of this research is to analyse the concept and forms of educational tourism, the factors and directions for the development of it, which will contribute to the preservation of local culture and traditions.

Educational tourism represents the travel for the purpose of acquiring modern knowledge in various spheres of human life.

Results and discussions

Educational tourism. The modern world is dominated by travel for educational purposes. Currently, a huge flow of various knowledge passes through human consciousness. Acquired knowledge is gradually forgotten and lost. Despite this fact, the knowledge received during the trip remains almost forever in our memory. This is related to the fact that positive emotions make a person experience this period again and again. In this way, educational travel can stimulate society to further development. Educational tourism is travel for the purpose of obtaining modern knowledge in various spheres of human life.

The tourism sector has become one of the most popular types of services these days. The opportunity to improve, to get an education abroad, to explore the world - made tourism one of the types of non-formal education [1].

Educational tourism refers to the excursions for the purpose of education, satisfaction of curiosity and other cognitive aspects and interests [2, p. 267].

This type of tourism contributes to the formation of educational mobility, self-education skills. The field of educational tourism covers all types of training and education that take place outside the place of permanent residence [3, p. 159-160].

Thanks to the educational tourism, a person can acquire new knowledge and information, and useful experiences.

The objectives established in educational tourism are:

1. obtaining a diploma;
2. increasing/acquiring qualifications.

In addition to these, students can get to know the place of residence, attractions, learn the customs and culture of the native population [4, p. 169].

Educational tours will allow people to treat each other more respectfully and appreciate the culture and behavior of all peoples. Also, educational tourism is considered a type of tourism, based on tourist demand associated with tourist needs in rapid and productive learning in various fields, in getting to know other countries and obtaining the necessary knowledge for personal development.

Iu. A. Matiuhina proposes the following forms of educational tourism [5, p. 176]:

1) Language centers - the most massive direction of educational tourism. Foreign languages are taught in these centers. The programs are designed for any age;
2) Internships abroad - there are programs with various directions, available throughout the year;

3) Children's vacation - programs are designed for schoolchildren and students who want to spend winter and summer vacations usefully. Teaching takes place in schools, colleges, universities;
4) Continuous professional training - advanced training, short courses for different ages with different degrees of training;
5) Higher education – university education. Also, special programs are developed in various fields for student exchange;
6) Preparation for a university - the preparation is carried out at an educational institution where the graduate plans to be admitted. In some universities, special schools/special year of studies have been established in which they prepare for admission to a certain specialty in the university.

The main objective of educational tourism is to gain knowledge and get satisfaction from leisure. Ancillary goals can be business relations, gaining new impressions, friendships, the desire to get acquainted with the cultural values of the host country, etc.

Educational tourism requires a highly professional approach because the given tourism includes the organization of educational trips for all age groups.

Educational tourism today mainly takes place within the framework of cultural exchange. The use of educational tours takes place either in small groups or individually.

Educational tourism aims at:

- training and development of personality;
- exchange of information;
- development of international relations;
- deepening knowledge about the host country.

Thus, educational tourism crystallized with the intensification of economic exchanges of human resources between countries, i.e. with the legislation of opportunities to learn in other states, to equate diplomas, to assimilate new skills abroad. These elements served as the foundation of the educational tourism development.

Given the fact that each type of tourism includes in itself a dose of knowledge, practicing religious tourism, for example, you also have the opportunity to discover something new and learn from the history of the country, monastery or church. Also, business tourism offers the opportunity to discover something new, to learn from foreign partners and to enrich the knowledge bag that the tourist possesses.

A trend that has left its mark on educational tourism development is globalization, which brings with it new demands on the inhabitants of certain states. In this context, with the intensification of globalization processes, people have to face several challenges such as:

1. exchange of experience with partners from abroad;
2. knowledge of international languages;
3. learning crystallized domains from an international perspective;
4. participation in studio and training programs offered by specialized training centers or institutions;
5. the need for lifelong learning that crystallized with the intensification of globalization [6, p. 84-85].

Educational tourism is one of the most popular types of travel. This segment of the tourism market is the most in demand abroad, because most of the people are looking forward to obtaining a diploma which could be recognized universally. Although the concepts of educational, cognitive and cultural tourism took shape with the evolution of tourism, their delimitation was carried out by researchers starting with the 21st century.

Educational tourism is travel with the aim of deepening knowledge in areas of interest to the individual, with the opportunity to obtain a diploma, certificate or other document certifying the authenticity of the qualifications received. Education is a challenging issue for many people.

However, you can swiftly and simply pick up the necessary information on a variety of subjects thanks to educational tourism. Educational tourism is defined as "travels of individuals or their groups to certain regions and countries in order to receive educational services for certain programs."

The following features of educational tourism are distinguished [4, p. 171]:

1) any journey during which the traveller is studying in any field;
2) a journey in which education is the main value;
3) income from educational tourism is used to support the economy of the country;
4) thanks to the development of educational tourism, new jobs appear;
5) educational tourism is an auxiliary means for the development of society.

Cultural tourism is without a doubt one of the oldest forms of the tourism phenomenon as people began to travel as far back as the time of the ancient Greeks. If we talk about the time of the birth of a certain analogue of modern tourism with a focus on visiting cultural attractions, then it can be attributed to the 19th century. So, in the middle of the 19th century. American Thomas Cook founded the first travel agency that offered Americans a "tour package" to culturally rich Greece and Italy.

It is generally accepted that cultural tourism has emerged as a separate and independent direction of tourism since the late 70s of the 20th century, when marketers and tourism professionals realized that a certain category of people travels the world specifically in order to gain a deep understanding of the culture or cultural heritage of the place they are going to [7, p. 256].

Cognitive tourism represents the tourist trips to visit any regions, localities, cultural centers, etc. to get acquainted with scientific achievements, monuments of nature, history, culture, life and traditions of the local population, folk crafts and crafts, achievements in the field of culture, industrial production, construction, etc.

Cognitive tourism affects the intellectual and creative development of the individual in the process of getting acquainted with the cultural values created by mankind during the period of its existence [4, p. 173-174].

Based on the information that has been analysed, we can conclude that the concepts of cultural and cognitive tourism are similar in terms of getting to know more about the heritage of a certain country, while the educational tourism, besides the function of extending the knowledge about the culture of a country, also refers to obtaining a diploma/qualifications in certain areas of study. In this sense, modern society should emphasize the development of educational tourism, given the fact that the knowledge, skills, experiences gained from study trips are necessary both for personal development and for ensuring a successful career, and cultural and cognitive tourism are necessary to complement the self-development of the beneficiaries.

On the same note, we can state the following about the levels of educational tourism with their characteristics (Table 1).

Table 1. *Characterization of the levels of educational tourism*

Level of educational tourism	Characteristics
1st level	The participation of children in children's camps, which is an incipient level of practicing educational tourism.
2nd level	Studying the languages of international circulation by participating in training courses.
3rd level	Participating in long-term courses that aim at acquiring knowledge in a certain field.
4th level	The practice of student and academic mobility, where students as well as teachers have the opportunity to study or teach abroad, at institutions and universities in other countries.

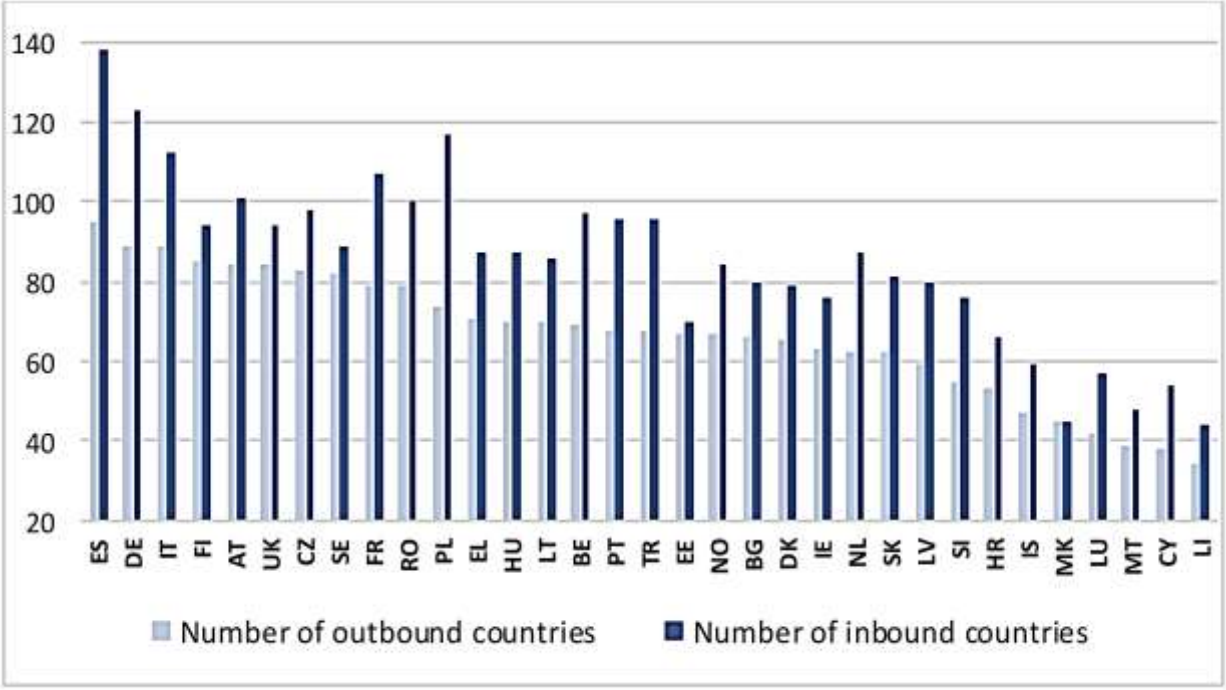
Source: [8, p.4]

The 4th level, which is considered as the deepest one, best encompasses the notion of educational tourism, because tourists travel to other countries participating in predetermined training programs in certain fields. We consider this field to be very deep and for the reason that these departures are planned, documented and regulated by special laws regarding mobility between institutions.

Mobility academic programmes. Based on the Erasmus+ Annual Report (2020) we can analyse the statistics of mobility academic programmes of outbound and inbound countries during the 2014 to 2020 period.

Analysing the Figure 1, we can observe that the countries which had the most exchanges per programme are: Spain (ES), Germany (DE), Italy (IT), Finland (FI), Austria (AT), France (FR).

Figure 1. *Erasmus+ exchanges per programme country. Number of outbound/inbound countries (all actions, 2014-2020)*



Source: [9, p. 18]

It has become clear that Erasmus+ is crucial in training the next generation of Europeans to adapt to a changing workplace, take on the climate problem, and be prepared for our societies' digital transformation. Over 20 500 learners and staff have mobilized since 2014, significantly increasing the number of participants from the EU's ORs. Higher Education accounts for 52% of participants, followed by Youth (26%), Vocational Education and Training (14%), School Education (7%) and Adult Education (1%), in that order.

Next, we are going to analyse the dynamics of the number of outgoing and incoming students of and from the top countries with the most academic exchanges and Romania, a country with which the Republic of Moldova has a strong relationship.

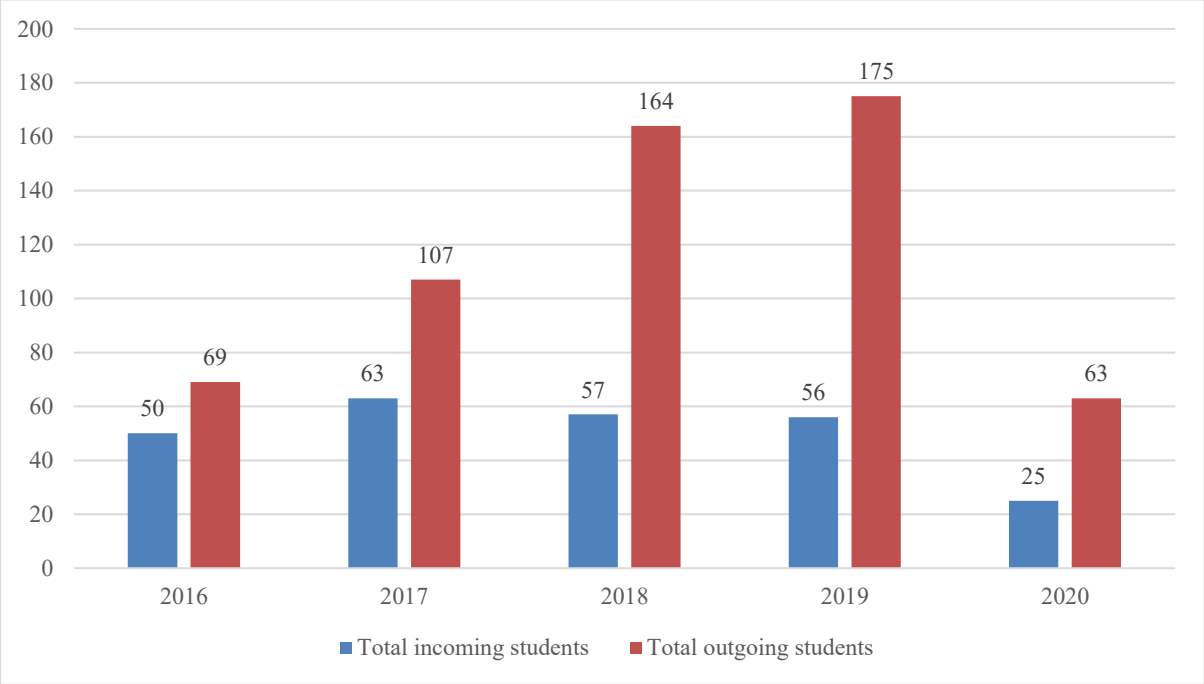
Based on the data shown in Table 2, we can observe the fact that Spain, Germany and France are the top three countries with the most academic exchanges during 2015-2020. Even though Romania has some pretty modest results in comparison with the other countries shown in the Table 2, they are still considerably better than the results that the Republic of Moldova has, which can be seen in Figure 2.

Table 2. *The dynamics of outgoing and incoming students during 2015-2020*

Countries	2015/2016		2016/2017		2017/2018		2018/2019		2019/2020	
	1	2	1	2	1	2	1	2	1	2
Spain	31552	31786	31109	33311	31088	34773	34296	34961	34421	35926
Germany	31996	23379	32137	22303	33102	21679	33282	21224	36357	18843
France	28157	22769	29851	21159	30402	21691	30496	22049	32259	22514
Italy	26368	17866	27497	19383	29527	20623	30877	21770	30992	22314
Poland	11215	12733	10036	13942	10006	14421	9692	14946	9044	15606
Portugal	6176	10179	6553	10971	7057	11697	7456	12390	7458	12555
Turkey	12964	5793	13303	2222	13834	2007	13197	2727	12968	3489
Romania	3713	2108	3720	2484	3888	2591	4200	2757	4427	2813

Note: 1 - Total outgoing students
2 - Total incoming students
Source: [10]

Figure 2. *The evolution of mobility exchanges in the Republic of Moldova during 2016-2020*



Source: Elaborated by the author based on [11]

By observing Figure 2, we can conclude that the number of outgoing students increased during 2016-2020, which denotes that there is a strong desire for acquiring new knowledge and experience in Higher Education institutions located abroad. On the other hand, the number of incoming students was pretty stable during this period, it oscillating between 50 and 63 academic exchanges. Unfortunately, we can observe a sudden decrease in both the number of incoming and outgoing students in 2020, a big reason for this being the COVID-19 pandemic, which imposed a transfer of the existing mobility programmes to the following semesters.

Moldova State University has registered a significant progress in academic exchange programmes. For instance, the number of incoming students in 2021 is higher than the number which was in the previous years, which denotes the fact that the Republic of Moldova has become more noticeable as a tourism destination, thanks to the promotion made by the state and

also by other agencies. This represents a good direction in the development of not only the general tourism, but also the educational one.

Table 3. *The evolution of incoming and outgoing students and staff, and foreign students at Moldova State University*

Year	Outgoing students mobility	Incoming students Mobility	Foreign students at MSU	Foreign Academic Staff mobility	MSU Academic Staff mobility
2019	**47** (to 6 countries)	**28** (from 9 countries)	134	3	15
2020	**26** (to 6 countries)	**12** (from 4 countries)	84	3	4
2021	**44** (to 7 countries)	**35** (from 11 countries)	162	5	21

Source: Elaborated by the authors based on [12]

An important aspect of the promotion of educational tourism is represented by the foreign students who complete their Higher Education studies in the Republic of Moldova, which require a period of stay for at least 3/4 years for a Bachelor Degree and 2/1,5 years for a Master Degree, period during which they can explore the cultural heritage of the country, create friendships, improve language skills, increase intercultural awareness, have a more active participation in society, improve career prospects and others.

In order to develop the educational tourism, a synergistic approach is necessary. The synergistic aspects aim at the simultaneous action based on the collaboration, the organic cooperation of the behaviours of all the actors involved in order to increase the quality of educational tourism.

Conclusions.

By investigating the structure and forms of educational tourism in order to develop it within the national economy, we can state the following:

1. Educational tourism requires a professional and synergistic approach because the given tourism includes several elements and related activities, targets certain individuals and needs an institutional organization.
2. The conceptual delimitation of educational, cognitive and cultural tourism represents a particular complexity, given the fact that the areas covered overlap to a certain extent.
3. The purpose of educational tourism, compared to the other forms, consists in obtaining certifications and diplomas for the education achieved in a certain field of study.
4. Educational tourism is characterized by four levels, the fourth being considered the deepest, representing the students who participate for a certain period in an academic experience exchange program.
5. An essential element in educational tourism development is academic mobilities, which in recent years have registered significant progress at the European level in terms of the number of participants, but also of the mobility programs created for the new generations of students.
6. The statistical data on academic mobility in the Republic of Moldova are modest compared to the countries of the European Union, including Romania, but there is hope that the synergistic forces (the state - through various regulations, the national tourism associations - by promoting the Republic of Moldova as a tourist destination, educational

institutions higher and, last but not least, the students) will stimulate the development of Erasmus+ programs and other similar programs, but also the increase in the number of foreign students.

All this aims to expand educational tourism in the Republic of Moldova, which will bring benefits to both educational institutions and the entire economy.

References

1. Zhukova M.A. ZH86 Menedzhment v turistskom biznese: uchebnoye posobiye - 2-ye izd., ster. – M.: KNORUS, 2006. – 192 s. ISBN 5-85971-451-3. Available at: https://tour-lib.net/books_tourism/jukova.htm
2. Zorin I.V. Entsiklopediya turizma – M., 2003. 368 s. ISBN: 5-279-02264-0.
3. Kolesnikova I.A. i dr. Osnovy andragogiki: Ucheb. posobiye dlya stud. vyssh. ped. ucheb. obrazovaniya – M.: «Akademiya», 2003. 240 s. ISBN 5-7695-0978-3.
4. Selivanova S.I. Obrazovatel'nyy Turizm v Razdele II. Ekonomika: problemy i perspektivy, s.169-174.
5. Matyukhina YU.A. Organizatsiya turisticheskoy industrii: ucheb. posob. – M., 2012.
6. Suslenco, Alina. Turismul educaţional – o interfaţă a mobilităţilor academice în Republica Moldova = Educational Tourism – an interface of Academic mobility in the Republic of Moldova / Alina Suslenco // Comunicarea internaţională : lucrările Conferinţei Şt. Intern., 25 mai 2018. Vol.2 : Educaţia şi arta ca mijloace de comunicare. – Iaşi : Ars Longa, 2018. – P. 83-90. – ISBN 978-973-148-292-7
7. Arkhipov A., Muzychuk V. Kul'turnyy turizm v oblasti strategii razvitiya otechestvennogo turizma // Vestnik Instituta ekonomiki Rossiyskoy akademii nauk. 2011. №4.
8. Corina Larisa BUNGHEZ," Educational Tourism: Erasmus Case Study", Journal of e-Learning and Higher Education, Vol. 2022 (2022), Article ID 498617, DOI: 10.5171/2022.498617
9. Erasmus+ Annual Report 2020. Available at: https://op.europa.eu/en/publication-detai l/-/publication/7bda9285-5cc4-11ec-91ac-01aa75ed71a1/language-en
10. https://erasmus-plus.ec.europa.eu/resources-and-tools/statistics-and-factsheets/factsheets/country-2020 (accessed at 12.10.2022)
11. https://university-internationalization.space/dimensions/outgoing-and-incoming-mobilities (accessed at 15.10.2022)
12. Moldova State University Reports. Available at: https://usm.md/?page_id=3237

ISBN: 978-2-931089-30-9

Infrastructure's Projects Risk Management Evaluation Within the Public-Private Partnership in the Republic of Moldova

Irina CALUGAREANU*
Academy of Economic Studies of Moldova - Republic of Moldova

Abstract: Public-private partnership is a new field of national science, which is insufficiently explored in the researches of local scientist. In this sense, in order to develop the insufficient conceptual framework it was necessary to elaborate, systematize and complete the indigenous scientific perceptions with explanations, anticipations and transformations of the stage of knowledge of the subjects of the „public-private partnership" and the „risk management", which complement each other and are an integral part of the content of the post-doctoral research carried out by the author. Also, we consider essential to contribute to the development of knowledge by a comprehensive PPP risk assessment method for the implementation of infrastructure projects. From this perspective, the author was convinced that the assigned topic is actual and important.
The important scientific issue refers to the scientific and methodological justification of the modalities of PPP infrastructure project's risk assessment, which confirmed the appropriateness of using the risk management assessment mechanism to achieve consistent and equitable results of public-private partnerships.

Keywords: management, public-private partnership, project, infrastructure project, risk management, infrastructure, contract, efficiency, methodology, algorithm, economic development, risk mitigation, strategies.

Introduction.

Public-private partnerships (PPPs) are increasingly important for economic growth in the modern world. Public-private partnerships, which have only recently gained popularity in industrialized nations, include organizational, institutional, and intellectual resources and are becoming more and more crucial to the integration of the management structure in both central and local public administrations [1, p.24]. Implementing public-private partnership structures in infrastructure projects is important because it allows for the simultaneous involvement of both public and private forces, which enables the use of new findings and investment tools. The ability to divide management responsibilities, risks, and accountability for the effective implementation of projects among its participants is a key component in the implementation of public-private partnership projects. In this regard, scientific theories pertinent to PPP explain the

* Corresponding Author: irinapoloz@gmail.com . ORCID: 0000-0002-1388-4875

comprehensive process by which public authorities become interested in capital markets, borrowing tools from the private sector and sharing the associated risks. This interest is not only financial, but also organizational and managerial. Several risks have been identified in the management of public-private partnership projects during the development of PPP relationships in the Republic of Moldova, including: deficiencies in the legislative framework, lack of clarity and transparency in the procedures for the selection of the private partner, the establishment of contractual conditions, the monitoring mechanism for project execution and compliance, and other elements of the formation and implementation of these types of projects.

Therefore, incorrect risk identification, sharing, and subsequent risk management always result in the failure of a PPP project, regardless of where it is in the implementation process. For these reasons, we think it's essential to create a system for assessing risk management for projects involving public-private partnerships, considering all of their unique features, especially the specificity of risk management standards, the expertise of private investors, and the capabilities and competences of central and local public authorities [3, p.45].

Analysis of recent studies and publications.

The information resources of this post-doctoral study were based on the reports and regulations of central and local public administrations (Ministry of Economy and Infrastructure, Public Property Agency, Court of Accounts, National Anti-Corruption Centre, Nisporeni and Ungheni District Council, etc.), documents issued by the international bodies (Project Management Association, World Bank, Basel Committee, Council of Europe, OECD, UNDP, UNECE, etc.), statistical data of the National Bureau of Statistics and European Statistics, own research based on poll opinion and in-depth interviews with experts in the field [2, 13, 14,15, 16].

The research methodology compiled various scientific methods, such as dialectical, logical, structural-functional, deduction and induction, analysis and synthesis, analogy and comparison. The analytical character of the research methodology was balanced and focused mainly on the analysis of the conceptual-theoretical framework and empirical research methods, which extrapolate public-private partnership and risk management of infrastructure projects in its context.

Results.

Currently, PPP has become an essential tool for the modernization of public infrastructure, given the fact that the traditional sources of financing available to the state are no longer sufficient and do not contribute to the development of the country. Thus, the notion of PPP and its management reveals the need for an organizational and institutional integration of public and private sectors for the implementation of socially significant projects in various sectors of the economy. The systematization of the multiple definitions of PPP allows the author to find out that PPP is a complex phenomenon established from a managerial and legal point of view for a certain period of time, involving co-financing and risk sharing, a form of interaction between the public and private sectors regarding the properties of central and/or local public administration, as well as the services performed and provided by state and/or municipal/district bodies, institutions and enterprises.

The author found that, in the specialized literature [1, p.34, 5, p.32, 6, p.411] there are no tools and methodologies for a comprehensive assessment of the numerous risks that arise during the management of projects in the framework of PPP. Therefore, there is a contradiction be-

tween the need for further development of the PPP mechanism in the implementation of complex infrastructure projects and the absence of mechanisms for an integrated assessment of emerging risks. At the same time, considering the classification of risks, it was noted that the exact boundary between each type of risk is quite difficult to achieve, since most risks are interconnected, and therefore changes in one risk affect changes in another risk. However, risk classification facilitates risk identification and the results of risk assessment and management. These contradictions led to the highlighting of the research problem - the lack of qualitative and quantitative mechanism for PPP framework-based risk assessment of infrastructure projects, a fact that confirmed the opportunity to use qualitative and quantitative methods for assessing risk management in order to obtain consistent and fair results of public and private partners. Thus, public-private partnership projects are not less risky, considering the multitude of risks that can appear at all stages of the project's life cycle.

The implementation of joint risk management in the realization of PPP projects involves the identification of risks at the planning stage of a PPP project, the classification, analysis and assessment of the risk of participation in such a project, the use of different methods of managing certain types of risks in development, construction and operation of infrastructure projects under PPP. This process allows the partner parties, through common effort, to reduce the probability of negative effect occurrences during project implementation. The author established that different classifications of risks related to PPP projects indicate the need for a systemic approach to the analysis of the numerous risks associated with the implementation of such projects. It was also demonstrated that the public partner does not assume significant obligations towards the implementation of the project. At the same time, the activities of the private partner, under the PPP contract, depend on the decisions made by the public partner or other authorities, thus, regardless of the conditions established in the contract, it bears the occurrence of most of the risks related to the public-private partnership project.

The post-doctoral research, confirmed the importance of risk mitigation strategies of a PPP project as a risk management tool, which, once implemented, allows the development of a risk management and sharing system that is most suitable for a specific project and is impossible to be achieved without the previous stages of risk identification and classification.

The identification of implementation limits of the public-private partnership in the Republic of Moldova and the evaluation of the circumstances of appearance of related risks allowed us to identify new sources of financing for the realization of investments in large-scale infrastructure projects, where the state guarantees constant profits. Public-private partnership projects may also be financed through attracting private capital as investment tools in the form of infrastructure bonds, deposits held by natural persons in commercial banks, or income from insurance firms in the Republic of Moldova. We were able to show that the Republic of Moldova's approach to risk management and the establishment of public-private partnerships only makes it possible for these relationships to emerge and grow within the confines of a sound national strategy. The institutional and state backing play the most significant roles in the creation of PPPs. As a result, the author of this study considered the analysis of state policy in the area of laying the groundwork for public-private partnerships. As a result, it was discovered that the Republic of Moldova's fundamental legal framework for regulating the PPP process is comparatively stable, adheres to international standards, is predictable, and ensures the transparency and security of legal investment relations.

By investigating single-factorial and multi-factorial econometric models, which sought to ascertain the influence of public-private partnership relationships on the Republic of Moldova's economic development index. It has been shown that public-private partnerships have a significant and positive impact on the Republic of Moldova's economic development index, and multi-factorial models have shown that investments, the number of employees, and the revenue

from annual sales of businesses with mixed ownership (public and private) have a significant impact on the country's economic development.

The author proposed a risk management mechanism in the context of the evaluation of risk management for infrastructure projects within the framework of PPP with the aim of minimizing the degree of uncertainty for the achievement of the goals set by the managers of PPP projects as well as the development of risks management processes. The risk management mechanism consists of an expert method-based representative algorithm for analyzing and concretizing the range of risks specific to infrastructure projects within the Republic of Moldova's public-private partnership, a statistical-mathematical quantitative risk assessment model for determining the correlation of particular risk groups of infrastructure projects within the PPP in the Republic of Moldova, and the engineering method, that refers to the creation of contracts for public-private partnerships that will enable the public and private partners to obtain and share the future benefits that the contract's subject will produce. These contracts will also serve as a tool to mitigate risks in accordance with the mandatory requirements of Moldovan law, as well as a model for calculating the effectiveness of public-private partnerships.

The results of the expert risk assessment method allowed us to highlight that the largest weight among the total risk groups has the risk of dishonesty from the private partnership, the business risks of PPP projects, the risk of increasing the estimated cost of the project and cost overruns , the macroeconomic and microeconomic risks, the risk of corruption and bureaucracy, the risk of lack of inter-institutional coordination, the political and economic risk, competitive risks, inflationary crises, the risk of cost overruns, the risk of intensification of control over the project by civil servants and the risk of non-completion of the objective in the established term. This means that both internal and external risks can occur on infrastructure projects within PPP. Project managers must effectively share risks through PPP contracts and foresee their existence by putting mitigation methods in place.

The author established the interdependence of the identified risks by the quantitative risk assessment model, analyzed the experts' opinions, and determined the linkage of the specific risk categories of infrastructure projects within PPPs in the Republic of Moldova.

The first use of PPP contract engineering as a risk mitigation method according to the imperative requirements of the Legislation of the Republic of Moldova contributes to the efficiency of contract management. For effective risk sharing and minimizing the possible consequences of risk occurrence, engineering of PPP contracts should be done at the very beginning to ensure completion and operation in time of the project.

The author combined the requirements of theoretical and empirical knowledge in the form of complementary national views on PPP, risk management practices, and management of infrastructure projects in PPP in order to advance a research project aimed at improving heuristic capabilities in the researched domain and highlight "Risk management of infrastructure projects in PPP" as a distinct research direction.

The principled new results for science and practice was reflected in the following provisions:

The PPP issue was approached for the first time in the Republic of Moldova in a generalized manner, with conceptual explanations on the definition, models, and forms of PPP, as well as its specific qualities, benefits, and implementation hazards. In the area of activity 521.03 Economics and management, an investigation has been conducted on risk management of infrastructure projects within the context of public-private partnerships in the Republic of Moldova, laying the theoretical and methodological groundwork for future research. The primary and secondary legislative framework for the Republic of Moldova was studied in order to identify any risks that should be addressed by modifying the framework for organizing, managing, and planning public-private partnerships. The Law No. 179/2008 on Public-Private Partnership was proposed to be amended in this regard, and the use of Public-Private Partnership Contract En-

gineering as a means of risk mitigation in accordance with the mandatory requirements of Republic of Moldova law was also suggested. The conducted empirical research allowed for the development of suggestions for both national and local public authorities. These will make it easier to manage risks for PPP infrastructure projects and to regularly and proactively check on how well they are working. The theoretical significance and applicative value of the post-doctoral research is the result of placing PPP and its risk management at the intersection of several economic and managerial scientific theories, the purpose of which was to decouple PPP from other forms of public-private cooperation, embedded in a new field of national science.

The postdoctoral results proposed elements of refinement of the scientific apparatus, theoretical and methodological instrumentation with new directions of risk assessment and risk mitigation in the management of infrastructure projects under PPP, (including , „Engineering of public-private partnership contracts as a method of risk mitigation", „Survey model for concretization of risks of infrastructure projects within PPP in the Republic of Moldova" etc), in order to increase the efficiency of PPP and decrease the degree of influence of risks on PPP projects" [7, p.229].

The applicative value of this work consisted in the fact that the substantial results of the conducted research can be used in the country at a macroeconomic level - by the central public authorities, at regional level - by the local public authorities, and at the level of PPP projects - by project managers, improving, at the same time, the existing interaction systems among public and private authorities, namely at:

National bearings:

- Application of the scientific and methodological apparatus that allows a more complete classification and assessment of risks in infrastructure projects based on the use of PPP models [8].
- The valences regarding the planning, organization and control of PPPs in the Republic of Moldova.
- Econometric analysis of the influence of PPP relations on the Republic of Moldova's economic development index [9].

Project bearings:

- Revision of risk management through study and specification of the range of hazards particular to PPPs in the Republic of Moldova using a representative algorithm [4, p.390].
- Consideration of PPP contract engineering as a risk mitigation method.
- The performance estimation approach for public-private partnerships.

Academic bearings:

The study's findings can also be applied to disciplines in higher education centers dealing with project management and risk management, to continuing education programs for professionals working in local and national public administration, and to the formulation of economic policies involving the use of private potential.

The analysis of the theoretical and practical foundations of the risk management in infrastructure projects within the framework of PPP allows us to argue that the implementation of these projects leads to the emergence of a significant number of risks. These risks require a thorough investigation of secondary and primary sources for the application of qualitative and quantitative evaluation methods and the implementation of mitigation measures by using the legal valences regarding the planning, organizing and control of the public-private partnership in the Republic of Moldova, the econometric measurement and the engineering of public- private partnership contracts in order to obtain consistent and fair results of public and private partners.

Conclusions.

Based on the research carried out by the author, it was found that in the Republic of Moldova there is a sufficient number of risks in the path of PPP establishment, and *the main directions* that can be grounded in future research refer to the following:

- The society, government and businesses have an indefinite, distorted and incomplete understanding of the essence of public-private partnerships, the practice of their application, the possible socio-economic consequences in the short, medium and long term. The PPP format changes the essence of the relationship between government and business both from a legal and economic point of view. So, it is necessary to develop teaching materials (in the form of standards and/or methodologies) to clarify and explain the situations (key issues) that may arise in the PPP relationship and the need to develop tools for a more efficient management of public-private partnership projects in order to reduce the risks related to the project development stage.
- The lack of an integrated approach. The development of the field of public-private partnership is not systematically carried out at a local level: the necessary attention is not paid to economic and social issues and to the mechanism of operation and regulation of PPPs.
- The lack of a separate platform for PPP projects. There is currently a unified information system of public-private partnerships that can be found on the APP website, but it contains incomplete information about existing PPP projects, it does not contain data about all the existing PPP projects. In this sense, a direction for development would be the development of database of infrastructure projects according to the EU "sharing-knowledge" model.

The total number of experts in the field of public administration in the Republic of Moldova, who have professional evaluation skills regarding the advantages and disadvantages of all forms of PPPs, is very small. Today, there are no such educational profiles in the Republic of Moldova, although the respective disciplines can be found in well-known universities abroad. At the same time, in the author's critical view, the topic of this thesis is not sufficiently in-depth from a scientific point of view, as the specific PPP relationships are in a permanent evolution and adaptation.

Acknowledgements..

This research was carried out in the framework of theState Program"Innovative business configuration in the context of regional competition", nb. 20.800020807.42.

References

1. AKINTOYE, A., BECK, M., HARDCASTLE, C. (2003). *Managing Risks and Opportunities.* Hoboken, New Jersey: Wiley-Blackwell, 448p. ISBN 978-0-632-06465-6.
2. DAC. (2008). *Principles for the evaluation of development assistance* [online]. Paris: OECD, 1991. 12 p. Reprint of original content OECD. https://www.oecd.org/development/evaluation/2755284.pdf
3. CĂLUGĂREANU, I. (2018). Risks of infrastructure projects in the private partnership in the Republic of Moldova. In: *Progrese în teoria deciziilor economice în condiții de risc și incertitudine*: conf. şt. intern., România, vol. 29, pp. 45-52. ISBN 978-606-685-609-6.

4. CĂLUGĂREANU, I. (2019). Risk allocation with in public-private partnership in the Republic of Moldova framework. *Analele Universităţii Ovidius. Seria Ştiinţe Economice.* vol. 19, nr. 1, pp. 389-395. **ISSN** 2393-3127.
5. CALUGAREANU, I., COCERHAN, M. (2019). Management of Municipal Public Administration Competitiveness. Odessa National University herald. Series Economy. vol. 24, issue 6(79), pp. 32-35. ISSN 2304-0920.
6. CĂLUGĂREANU, I. (2019). Particularities of public-private partnership in the social field of the Republic of Moldova. În: *Proceedings of the 13th International Conference on Business Excellence,* Romania 22-23 March, 2019. Bucharest, vol. 13(1), pp. 411-420. ISSN 2558-9652.
7. CĂLUGĂREANU, I. (2019). Limits of implementation of public-private partnership in the Republic of Moldova. In: *SEA - Practical Application of Science.* Iași. vol. 7, issue 21(3), pp. 229-235. ISSN 3260-2554.
8. CĂLUGĂREANU, I. (2019). Dezvoltarea infrastructurii regionale a Republicii Moldova în baza conceptelor internaționale. *Economica.* nb. 2 (108), pp. 53-66. ISSN 1810-9136.
9. CĂLUGĂREANU, I. (2020). Determination of the Local Development Index of the Republic of Moldova in the Context of the Creation of Innovative Hubs. *Eurasian Journal of Social Sciences.* Vol. 8, issue 3, pp. 111-122. ISSN 2148-0214.
10. CĂLUGĂREANU, I. *Managementul proiectelor de infrastructură în cadrul parteneriatului public-privat din Republica Moldova: premisele dezvoltării și evaluarea riscurilor*. Chișinău: ASEM, 2020. 399 p. ISBN 978-997575-982-3.
11. CĂLUGĂREANU, I. (2020). Risk management and risks mitigation strategies for public-private project management. *Інфраструктура Ринку*. Ukraine, Odesa. вип. 50, pp. 53-55. ISSN 2519-2868.
12. UNDP MOLDOVA (2020) [online]. https://popp.undp.org/search/Pages/results.aspx?k=risk&fbclid=IwAR158mUlKRhSSLtFxH8xWrb2yRRN7VxIVf_noiu9hW8Y1cIF6MoSJ8YFOvk
13. UNECE. (2008). *Guidebook on Promoting Good Governance in Public-Private Partnership* [online]. 104 p. https://unece.org/fileadmin/DAM/ceci/publications/ppp.pdf
14. UNIDO. (2018). *IPPA Teaching Materials. Investment project preparation and appraisal* [online] https://www.unido.org/sites/default/files/2007-11/20036_0388381_0.pdf
15. WORLD BANK. (2017) *Private Participation in infrastructure* [online]: Annual Report. 26 p. http://documents1.worldbank.org/curated/en/658451524561003915/pdf/125640-AR-PPI-2017-AnnualReport-PUBLIC.pdf
16. WORLD BANK INSTITUTE. (2020). *Managing the Implementation of Development Projects* [online]. https://openknowledge.worldbank.org/bitstream/handle/10986/13630/9780821366431.pdf;sequence=4

ISBN: 978-2-931089-30-9

The Impact of Globalization on Tourism in the Republic of Moldova

Natalia ANTOCI*
Moldova State University - Republic of Moldova

Abstract: The process of globalization, the emergence of an increasing number of multinational companies, the partnerships of national companies with those abroad, but also cultural issues with which tourism managers have contact, creates an extremely competitive business environment, in which companies face a number of challenges from this perspective, one among the direct and visible consequences of globalization on the activity of enterprises o represents the possibility of concluding and developing new strategic partnerships. Globalization imposes special requirements on national economies, at the macroeconomic level a strategy capable of ensuring the orientation of the activity towards macro-stabilization is needed economic, as well as to boost the process of modernization of the technological structure and the productive aspects of the economy, taking into account the requirements of greater exploitation of the national potential, but also of the effective inclusion of the Republic of Moldova in the international division of labor and competition worldwide.

Keywords: globalization, national economies, strategic partenerships, tourism, culture.

Introduction.

The development of the global economy in recent years has undergone many changes, caused by globalization and its effects. Globalization has transformed society as a whole, connecting all the cultures of the world, simultaneously causing a huge number of qualitative changes, which affected the global economy, global trade, transportation, environment and other areas. Two among the most obvious phenomena in the world economy in recent years has been an increase rapid extent to which economies have become interconnected and a significant increase in income inequality in many countries. This phenomenon did not connect the whole world, creating a global structure to the economy. Economic globalization is based on a liberal conception of the free market. In other words, it is based on the activity of self-regulating forces and on operating on the basis of private property and freedom of business. Advances in technology information and transportation have dramatically expanded economic, political and cultural interaction between the actors on all sides.

The Republic of Moldova, in the structure of national tourism, presents itself very modestly, being a destination issuer with a constant positive and negative balance of the tourism balance. The current situation of tourism in The Republic of Moldova is due to the neglect of tourist activity and the absence of a reasoned policy in the problems of the creation of tourist infrastructure and territorial tourist development. One of the problems priority for the development

* Corresponding Author: antocinatalia57@gmail.com . ORCID: 0000-0002-7433-106X

of tourism in Moldova is directly dependent on the capacity and degree of valorization of tourist resources. In this sense, the policy and strategy of the state regarding development tourism of the Republic of Moldova must be developed and realized based on the development concept durable. Thus, the development of tourism in the Republic of Moldova will have to show a concordance between development and certain sustainability criteria: in other words, tourism development must be bearable in the long term under the ecological aspects, economically viable and equitable under the aspects ethical and social for the local population. A good management of the tourist activity, supported by a policy active state, can guarantee a sustainable development of national tourism. National tourist flows represent one of the most dynamic components of exchanges economic. Along with rest, national tourism has registered as a deep trend of our era, which developed thanks to the processes of mechanization and automation of human life. The Republic of Moldova, as a tourist destination, has a rich potential for its visitors.

Tourism has every chance to improve the state's balance of payments by increasing the export of tourist services. The tourism product of the country represents a complex environment, both natural, as well as created by people (heritage, culture, activities, visitor services). The tourist potential of Moldova is extremely large, created by the multitude of objectives both natural and anthropogenic tourism. [6, p 67]. The multitude of valleys, an extraordinary flora, a favorable climate, a diverse relief, the multitude of relief forms, parks, springs, the multitude of old buildings, monuments, historical buildings, museums, monasteries, churches, create a special, extraordinary potential but unfortunately, we have to admit that it is still underutilized. The promotion and capitalization at the national level of the ecotourism potential of the Republic of Moldova ca ecotourism destination stimulates the development of the positive image of the country, by attracting visitors foreigners and locals.

Currently, some tourism enterprises in the country are trying to enter the tourism market international and national with ecotourism offers, promoting a healthy way of life, propagating hiking, green tourism. Tourists began to appreciate the practice more and more stays in places where natural resources are protected in an institutionalized way, which forces natural resource holders to cooperate and thereby promote higher standards higher on the administration of environmental resources and natural areas. For the valorization and promotion of the Republic of Moldova, several actions must be elaborated economic plan, tourism and environmental protection, such as:

- the promotion of an optimistic institutional and public framework for development in the field of urban equipment and rural;
- improving and promoting the image of the country of the Republic of Moldova, especially the rural areas; creation of tourist information and promotion centers, promotion of all events)
- the development of leisure areas for pleasant and favorable holiday spending and promoting ecotourism;
- adequate and uniform location of accommodation units and public tourist catering throughout the territory of the Republic of Moldova;

The Republic of Moldova has an important unusual tourist potential, but unfortunately, mostly unutilized. Attracting a large number of foreign tourists, from the West and the East, can help substantially increasing the volume of foreign exchange receipts and achieving economic efficiency increased tourism activity in the country. In this sense, a collaboration between the "players" is necessary tourism industry regarding the training, promotion and marketing of tourist products". The launch of tourism development in the Republic of Moldova requires organization, planning and management, to state level, of the tourist activity that can only be carried out through the structures respective organizations. [4, p 34]. Agencies play a special role in promoting the tourist product tourism, which performs functions of promotion and marketing of tourist offers, maintenance relations with tourist consumers and their loyalty

actions, the organization of trips, transmitting the flow of information from consumers to providers/tour operators.

Identification of ecotourism development potential in the Republic of Moldova

The Republic of Moldova is a small state with a total area of 33,846 km and a population of 3.5 million people. It borders Ukraine to the east and Romania to the west. Although it has a relatively small area, it has a rich natural setting in terms of its degree of endowment with natural reserves, landscapes, lands, river meadows, rocky hills, forests, etc.

According to the RM Law no. 1538 of 25.02.1998 regarding the fund of natural areas protected by the state, there are 466 natural objectives and monuments, with a total area of 66.5 thousand ha or 1.96% of the territory The protected natural areas of Moldova are presented as 5 reserves (with a total area of approximately 19.4 thousand ha), 63 natural-forestry, medicinal and mixed plant reserves (over 8009 ha), 41 presagistic reserves (34.2 thousand ha), 13 resource reserves, 32 areas with multifunctional management (over 1000 ha), 130 natural monuments, 20 monuments of landscape architecture, a botanical garden (105 ha), two denclrological gardens and a zoological garden (20 ha), as well as reserves in progress development (Orhei National Park, Lower Dniester, Royal Forest, Lozova Biosphere Reserve). In the country, there are 433 secular trees taken under state protection and 269 species of animals and plants, included in the Red Book of the Republic of Moldova.

From a paleontological point of view, the territory of the Republic of Moldova is one of the richest and most unique in Europe, having great scientific and touristic value, which includes geological and paleontological monuments taken under protection, in number of 86, with a total area of over 2681 ha, including geological outcrops (15 objects), ravines (23), fossil fauna sites (6), cliffs (3), reef mounds (5), gullies (3), gorges (7), quarries (6) , tectonic fractures, tectonic faults, geological profiles and sections, steep slopes and banks, gorges, hills, caves, karst funnels, grottoes, meanders, terraces, geological complexes, fossil soils, clays, Aetolian clays. In the area of the Middle Dniester, particularly attractive are the monuments from Naslavcea, Cosăuţi, Bursuc, Climăuţii de Jos, Răspopeni, Pripicenii-Răzeşi, Pocşeşti — on the right of the river and Raşcov, Ofatinţi — on the left, and in the Lower Dniester region highlights the fossil nests from Calfa, Salcia, Varniţa (left bank) and the geological-paleontological monument Văgăuna Clocot from Tiraspol. In the south of the Republic of Moldova, the fossil nests from Taraclia stand out. Cirnişlia, Luceşti, Găvănoasa, Văleni, Cişmichioi, Etulia and others.

The hydrological monuments taken under protection are not so numerous — 31 objectives with an area of 100 ha. Moldova has a network of over 1,600 reservoirs, most of which have an area of up to 20-30 ha. Among them, 22 have areas exceeding 100 ha each. Taken together, these lakes occupy a total area of almost 25 thousand ha, accumulating over 1 billion m3 of water. The largest lakes are located in Costeşti on the Prut (7700 ha), at the Dubăsari Hydroelectric Plant (6750 ha), the Cuciurgan Thermal Plant (2800 ha), Taraclia (1129 ha), Ghidighici (900 ha) and Ialoveni (708 ha). in several lakes, high-quality fish species are raised, for example, silver carp, which are in demand everywhere. There are only a few natural lakes in the Republic of Moldova (Beleu, Manta, Antoneşti on the lower reaches of the Prut and Bâcul, Crasnoe in the Dniester Valley), they, being small, are used for fishing [2, p 56].

There are more than 3,000 springs, 70 of which are mineral waters, whose chemical composition allows the treatment of various ailments. As a source of drinking water, in the places of tourist stops, there are springs with ordinary water, located along the tourist routes, some of them being taken under the protection of the state. As a result of the investigations, some opportunities for the development of ecotourism for each area are highlighted, mentioned later:

1. The Edineţ-Ocniţa tourist area with three sub-areas: Edineţ, Ocniţa, Donduşeni, imposing with special natural monuments and various cultural-historical objectives. Among the main ecotourism attractions, the geological reserves can be mentioned: Naslavcea, Mereşeuca; dendrological parks: Ţaul, Mândâc, Caracuseni; forests of recreational landscape interest: Gârbova, Ocniţa; scientific-geological reservations - Pererâta; forest reserves: Feteşti, Teţcani, Gordineşti; secular oaks: Brâzeni; the karst landscape monuments: the cave of Criva, Feteşti, Caracuşeni, Brânzeni, Buteşti, Horodişte, the Prut toltres - a unique monument in all of Europe; Stânca-Costeşti reservoir.
2. Balti tourist area. Within this area, monuments of great ecotourism and scientific value are concentrated, such as the "Pădurea Domnească" Scientific Reserve, with the unique colony of marsh birds "Tara bâtlanilor", the relict lake "La Fontal", the Cubolta park, the landscape reserve lzvoare-Risipeni, the aquatic ecosystem "La mòara" from Recea, etc. Among the cultural-historical monuments, within the Bălţi tourist area, we can mention churches, historical and art monuments, mansions and castles, ethnographic museums. The given area has a well-developed transport infrastructure, provides road, rail and air connections inside and outside the country, offers good access to all tourist attractions. Several regions in the given area, such as Făleşti, Glodeni. Râșcani, are included in the "Upper Prut" Euroregion, and Floreşti - in the "Siret-Prut-Nistru" Euroregion, which makes possible a better utilization of resources and the development of ecotourism activities, as well as the creation of an attractive natural environment for carrying out tourist activities, in general.
3. The "Codru" tourist area, with four sub-areas: Orhei, Teleneşti, Călăraşi, Hânceşti, represents the most important area for the exploitation of ecological tourism, having natural protected areas (2 scientific reserves, 10 landscape reserves and 28 natural reserves). The scientific reserves are of particular interest. The "Codrii" scientific reserve, from a territorial point of view, is divided into three functional areas: the strictly protected area, the tarnpon area and the transition area (the area where all kinds of economic activities can be carried out). The second Beech reserve" was established for the purpose of conserving and studying some of the most representative ecosystems from the Codrir area. Among the landscape reservations, we can mention those in the localities of Valea Mare, ţigăneşti, Trebujeni, Curchi, Ivancea, Temeleuţi, Vila Nisporeni, BAmut Forest, Hânceşti Forest, Lăpuşna, etc. Those from Teleneşti, Nemţeni, Sărata-Galbenă, Condriţa, Sadova, Seliste-Leu, Boguş, etc. are considered natural reserves. Having a rich area of cultural-historical monuments, such as the Orheiul Vechi archaeological reserve - benefiting from a well-developed and tourism-friendly infrastructure - the Codru tourist area represents the most important alternative for the development of ecological tourism in the Republic of Moldova.
4. Chisinau tourist area includes forests of landscape, scientific and recreational interest Scorţeni, Căpriana, lakes and ponds - Chisinau, Ghidighici, Ulmu, mineral waters - Chisinau, Speia, Oniţcani, hunting ground and fish pond. The Chisinau tourist area can be considered second in terms of the value of natural heritage and cultural-historical monuments, with a well-developed tourist infrastructure due to the geographical position of the city of Chisinau in the area - the capital of the country and the center of concentration and dispersion of national tourism. The city of Chisinau is also known for the presence of the Arboretum, the Botanical Gardens, the Zoo, classified as natural areas protected by the state and which represent important values for the development of ecotourism.
5. Soroca-Dubăsari tourist area with three sub-areas: Soroca, Camenca and Dubăsari. The Dniester River from Dubăsari to its discharge into the harbor, the "lagorlâc" Scientific

Reserve, the forests of landscape and scientific interest: Cosăuţi, Holoşniţa, Saharna, Cotiujeni, Onişcani, Ţapova, Oxantea, the Temeleuţi dendrological park, the rest base from Holercani represent important attractions for the development of leisure and ecological tourism.

6. Cahul tourist area. This area yields slightly to the other regions of the Republic establishing itself through landscape reserves - Codrii Tigheciului, lakes and landscapes from the Prut meadow, peduncular oaks - Giurgiulesti, mineral waters - Cahul, as a spa resort, hunting ground, cultural-historical objectives: the churches of Colibaşi, Brânza. Being crossed by transit roads to Ukraine and Romania (with the Giurgiulesti customs point), but also having an external position to Chisinau and other regions of the country, the Cahul tourist area, by developing special tourist routes, can promote the tourism of this region through the following forms of tourism: ecotourism, rest and leisure, treatment, itinerant with historical valences.

Analyzing the degree of distribution of the tourist areas described above, we can say with confidence that the Republic of Moldova, although it is a small state in size, possesses a rather vast natural heritage that deserves and must be visited. Manifesting itself as an agent of preservation, development, monitoring and lastly the renovation of reservations, monuments and national parks R.M. tends to promote its natural values, to highlight them, carefully preserving their frame and originality.

Conclusions.

In conclusion, we can say that ecotourism at the present time has managed to expand its activity limits both internationally and nationally based on the good functioning of the strategies selected and implemented. The need for the economic and sustainable development of ecological tourism reveals the idea of applying a strict program of measures aimed at preserving the potential of ecological tourism in the Republic of Moldova, which is currently operating properly. The concept of a protected area is a method of state involvement with the aim of partially or even totally limiting people's access to places with an important ecological value at the international level, thus creating the global natural framework, ensuring the integrity and diversity of nature. Although the Republic of Moldova is a small country, it has an ecological tourism potential distributed almost evenly throughout its territory. An unusual variety of hills, plains, forests, reserves, rivers, lakes, valleys and everything that forms green tourism. Manifesting itself as an agent of preservation, development, monitoring and last but not least the renovation of reserves, monuments and national parks R.M. it tends to promote its natural values, to highlight them, carefully preserving their frame and originality. [3, p 26].

There is a close relationship between the legal framework and tourism. Tourism contributes to public health in an attractive and prosperous way and the state is the figure that must regulate any form of activity carried out within its limits. Thus, the fusion of these two is the key to success in the practical application of new developed projects. Analyzing the general ecological tourism potential of the Republic of Moldova, we can say with confidence that it represents not only a possibility of economic and social development, but also a firm way of preserving, protecting and safeguarding the environment. Respectively, this branch of the tertiary sector has an ever-increasing trend of evolution, being catalyzed by both the natural environment and the demand from the domestic and foreign tourist market.

References

1. Law no. 1538 of February 25, 1998 regarding the fund of natural areas protected by the state;
2. Government Decision no. 274 of 18.05.2015 regarding the approval of the Strategy regarding the biological diversity of the Republic of Moldova for the years 2015-2020
3. Neacșu Nicolae, Tourism and sustainable development, Expert Publishing House, Bucharest 200, 243p.
4. Puiu Nistoreanu, Ecotourism and rural tourism, Bucharest Publishing House, 2002, 189p.
5. Pricope Ferdinand, General Ecology, Alma Mater Publishing House 2014, 196p.
6. Sergiu Rusu, Entrepreneurship in tourism and the hospitality industry, Publishing House C.H. Beck, Bucharest 2014, 235p.

ISBN: 978-2-931089-30-9

Les actualités dans le domaine de l'écotourisme dans la République de Moldova

Mariana STOICA*
L'Université d'Etat de Moldova - République de Moldova

Abstrait : L'application des principes du développement touristique durable dans les zones naturelles protégées a conduit à l'émergence de l'écotourisme en tant que forme distincte de tourisme, dont les principaux objectifs sont de respecter l'intégrité des paysages naturels, la biodiversité écologique, conformément aux exigences de certains segments de touristes, qui souhaitent passer leurs vacances dans nature et en même temps créer des possibilités pour le développement local des communautés. Même si au départ l'industrie du tourisme était considérée comme une activité à moindre impact sur l'environnement, en réalité de nombreuses destinations touristiques de premier plan ont subi de nombreuses dégradations. Le désir de profits élevés, la surexploitation des ressources naturelles et culturelles, crée le risque d'une des évolutions chaotiques au sein de ces zones sensibles, générant de nombreux problèmes, tels que: l'augmentation de la densité du bâti, la demande excessive des visiteurs pour certains objectifs touristiques, le bruit, la pollution atmosphérique, la manque des mesures de protection efficaces, etc., sont des dangers pouvant affecter la valeur touristique de la zone, la réduction qualitative et quantitative des ressources disponibles voire la disparition des attraits touristiques.
Bien que la République de Moldova possède un patrimoine écotouristique particulier, avec un grand potentiel valorisation, l'écotourisme est un segment confronté à de nombreuses problématiques telles que: promotion modeste au niveau national et international, faible développement des infrastructures spécifiques de l'écotourisme, la faible coopération au niveau local, la migration de la main-d'œuvre, le petit nombre de ceux qui une bonne formation sur le terrain, un cadre légal qui ne répond pas suffisamment aux besoins sur le terrain services de proximité, etc. La recherche proposée visait à présenter l'état actuel de son développement formes de tourisme au niveau national et international et d'élaborer un ensemble d'orientations pour guider les efforts de valorisation de certaines zones naturellement importantes par le biais de l'écotourisme.

Introduction.

L'écotourisme s'est développé dans les dernières décennies du XXe siècle en raison du risque créé par le surdéveloppement du tourisme. Le tourisme écologique ou l'écotourisme (aussi appelé tourisme «vert», où «doux») est apparu sous forme des actions contre la pollution de l'environnement et se manifeste le plus souvent à travers des activités qui contribuent à la protection de divers objectifs naturels et sociaux.

Selon la Société Internationale d'Ecotourisme, « l'écotourisme est un voyage responsable dans des espaces naturels, mais qui préserve l'environnement et soutient le niveau de vie des populations locales».

Dans l'opinion de l'Union Mondiale pour la Conservation de la Nature l'écotourisme se définit comme un voyage:

* Corresponding Author: stoicamarianamd@gmail.com . ORCID: 0000-0002-1624-7353

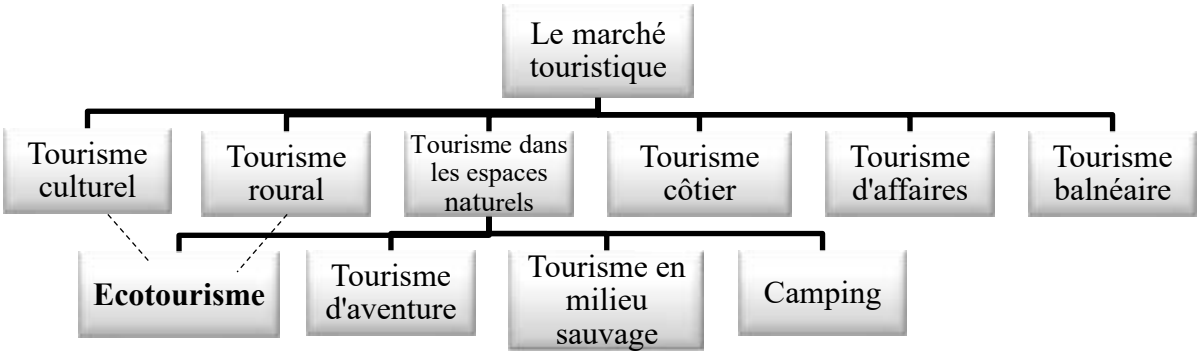
- respectueux envers l'environnement,
- dans des zones naturelles relativement préservées,
- dans le but d'apprécier la nature,
- qui promeut la conservation,
- a un faible impact négatif,
- assure une implication socio-économique active et bénéfique pour la population locale.

Le Sommet Mondial du Tourisme à Québec en 2002 a proposé de considérer que «l'écotourisme embrasse les principes du tourisme durable, en ce qui concerne l'impact économique, social et environnemental du tourisme». Dans cette ordre d'idées, les principes du l'écotourisme peuvent être encadrées dans le concept plus large de tourisme durable, ceux-ci:

- contribuant activement à la préservation du patrimoine naturel et culturel;
- incluant les communautés locales et indigènes dans la planification, le développement et l'exploitation de l'écotourisme, contribuant au bien-être des communautés;
- présentant le patrimoine naturel et culturel de la destination écotouristique à ses visiteurs;
- se prêtant mieux aux voyageurs indépendants, ainsi qu'aux circuits organisés pour petits groupes.

On peut conclure que l'écotourisme représente en fait la forme la plus précieuse de manifestation du tourisme durable. Cette forme de tourisme a pour objectif principal la préservation de l'environnement et met l'accent sur l'éducation des touristes en matière de protection et de préservation de l'environnement. La place de l'écotourisme parmi les autres formes de tourisme est illustrée dans la Figure 1.

Figure 1. *L'écotourisme comme segment de marché*



Source: Megan Epler Wood, Ecotourism: Principles, Practices and Polices for Sustainability (2002); Eagles P., Internațional Ecotourism Management (1997)

L'écotourisme est axé sur la découverte de la nature, l'apprentissage de son fonctionnement et surtout de l'attitude positive de l'homme pour que cette ressource reste inépuisable, basée sur un partenariat entre tour-opérateurs et communautés locales. La fragilité des ressources suggère aux touristes des attitudes de protection, de conscience, de fournir des actes pour encourager la conservation, renforçant le rôle des communautés d'accueil.

Sur le marché de l'écotourisme, les ressources naturelles sont primordiales, suivies après par les ressources anthropiques. Ainsi, les ressources naturelles réunissent les parcs, les parcs nationaux, les monuments de la nature, les réserves naturelles spéléologiques, géologiques, paléontologiques, botaniques, forestières, mixtes, les paysages donnés par le relief volcanique, karstique, structurel, fluvial, glaciaire, par la présence de ressources hydrologiques (cascades, lacs, sources thermales, geysers, karsts).

Les particularités des ressources écotouristiques de la République de Moldova.

Même si la République de Moldavie est un petit pays en termes de superficie, elle possède suffisamment de ressources naturelles attrayantes pour un tourisme soutenu. Le patrimoine naturel et humain national sont les principaux éléments qui attirent et motivent les circuits touristiques dans les localités moldaves.

La République de Moldavie possède un paysage pittoresque représentatif de différentes régions, un système de réserves naturelles de différents types, une flore et une faune spécifiques, qui servent à motiver les visiteurs sur les itinéraires d'écotourisme dans le pays. Certaines zones protégées retirées du circuit agricole sont utilisées, où les activités non polluantes et le tourisme sont encouragés. De cette manière, on obtient une utilisation durable du potentiel touristique naturel, capable d'attirer de nouveaux visiteurs.

Il y a plusieurs catégories de terres qui ont une fonctionnalité touristique prioritaire en Moldavie, notamment:

- Les fonds des zones naturelles protégées par l'État;
- Le fonds forestier;
- Le fonds de l'eau;
- Les espaces verts dans les zones urbaines et rurales.

Les aires protégées sont situées à proximité des villages, ce qui crée des prémisses pour le développement du tourisme rural, y compris l'écotourisme.

Le fonds des 54 zones protégées par l'État de la République de Moldova est, conformément à la législation nationale, ouvert aux formes organisées de tourisme, aux activités conventionnées et à toute la population du pays. Cependant, seuls quelques espaces naturels sont présents dans les offres touristiques en tant que destinations finales ou en tant qu'objectifs de visite supplémentaires dans les itinéraires combinés vers les monastères et les lieux historiques. Les forêts représentent d'importantes destinations écotouristiques nationales qui font partie de la plupart des réserves.

L'évolution du fonds foncier de la République de Moldova est présentée dans le Tableau 1.

Tableau 1. *L'évolution du fonds foncier, des milliers d'hectares.*

	2015	**2016**	**2017**	**2018**	**2019**	**2020**
Terrains au total	3 384,6	3 384,6	3 384,6	3 384,7	3 384,7	3 384,7
Terres agricoles	2026,5	2 028,3	2 039,8	2 041,6	2 073,0	2 092,0
Terres des localités	314,8	314,3	313,6	314,0	314,0	314,2
Terres du fonds forestier et destiné à la protection de l'environnement	450,5	451,7	451,0	451,9	452,1	452,3
Motifs du fond de l'eau	85,1	85,2	85,1	85,4	86,7	86,9

Source : statistica.md

Même si dans la République de Moldova, environ 3% du paysage présente un intérêt pour les activités touristiques, auxquels s'ajoutent plus de 5% du territoire couvert par des aires naturelles protégées, ainsi que des étendues d'eau ou des forêts récréatives (environ 45% du fonds forestier national), en réalité, les estimations montrent que la part des terres effectivement aménagées pour le tourisme est inférieure à 1 % du total. Ce fait dénote le grand potentiel de développement de l'écotourisme dans notre pays [7, page 17].

Si l'on analyse la surface des espaces verts dans certaines régions (Tableau 2), on constate que les surfaces d'espaces verts au sein des localités urbaines sont assez faibles, par rapport à la surface totale des territoires des localités urbaines. Et la superficie des plantations dans les zones urbaines est encore plus petite, enregistrant des valeurs insignifiantes.

Tableau 2. *Superficie des espaces verts par région, 2018, en milliers de mètres carrés.*

	Surface des terres dans localités urbaines	Surface des espaces vertes dans les villes	Surface des plantations dans les localités urbaines
Total sur pays	91 138,5	7 925,0	158,8
Municipalité de Chisinau	26 486,2		
Le Nord	22 622,6	1 538,6	30,5
Le Centre	23 956,6	1 200,3	10,6
Le Sud	15 221,0	546,5	21,1
Unité Térritoriale Autonome Gagauzia	2 852,1	205,5	5,2

Source : statistica.md

Pour la République de Moldova, les zones forestières représentent un potentiel important pour attirer les visiteurs. La végétation forestière est un élément essentiel pour la création des paysages, une source de traitement balnéo-climatique relativement bon marché, un lieu d'implantation de diverses installations touristiques et de loisirs sportifs.

Le potentiel naturel national est l'un des principaux éléments qui attirent et dirigent le flux de touristes et d'autres visiteurs vers les destinations touristiques de la République de Moldova.

Le fonds forestier du pays couvre plus de 12% de son territoire. Environ 45% du total sont des forêts récréatives et celles destinées à la conservation de la nature, qui doivent servir à des activités d'excursion, à des accords organisés et à des cures thermales comme alternatives à divers types de tourisme non organisé.

Les plans d'eau sont des éléments importants de création de paysages et de lieux de pratique du tourisme, de la baignade et de diverses activités nautiques. Diverses installations de loisirs et plages sont situées au bord des bassins d'eau. En Moldova, les ressources d'eau sont limitées à environ 1,32 milliard de m3, le réseau hydrographique se compose de 3621 cours d'eau d'une longueur totale d'environ 16 000 km. D'importantes ressources touristiques sont les bassins d'eau curative, ainsi que ceux pour la pêche, la chasse et les réserves naturelles.

Les espaces naturels protégés, les reliefs insolites comptent parmi les attraits les plus recherchés lors des séjours touristiques, notamment ceux à vocation touristique. Une partie considérable des attractions incluses dans l'arrière-plan des zones naturelles protégées font l'objet d'itinéraires écotouristique. Les réserves les plus représentatives sont: la réserve scientifique «Plaiul Fagului», la réserve scientifique «Codrii», la réserve scientifique «Pădurea Domnească», «Prutul de Jos», la réserve paysagère «Trebujeni», la réserve paysagère «Suta de Movile», la réserve paysagère «Turkish Garden», la réserve paysagère «Capriana-Scoreni». Dans le Tableau 3 distribution des réserves scientifiques selon les rayons. Tous les espaces naturels doivent être exploités pour le tourisme organisé selon certains sous-espaces bien définis: sentiers écotouristiques, lieux d'observation de la nature, aménagement du territoire pour les loisirs, constructions légères pour l'hébergement des visiteurs.

Tableau 3. *Caractéristiques des réserves scientifiques*

Nom de la réservation	Le rayon	L'année d'établissement	La surface, ha
Codrii	Straseni	1971	5177
Padurea Domneasca	Glodeni	1993	6032
Plaiul Fagului	Ungheni	1992	5642
Iagorlac	Dubăsari	1988	836
Prutul de Jos	Cahul	1991	1691

Source : statistica.md

Les réserves naturelles sont des espaces naturels intensivement exploités dans le tourisme international, elles constituent des ressources naturelles précieuses d'un point de vue scientifique et sont destinées à préserver et restaurer une ou plusieurs composantes de la nature pour maintenir l'équilibre écologique. Il y a 63 réserves naturelles dispersées sur le territoire de la République de Moldova, elles représentent des zones occupées par certaines espèces de flore et de faune qui, en raison de leur valeur scientifique et esthétique, nécessitent une protection. Elles sont classées en trois catégories :

- 51 réserves forestières (Sadova, Sărata Galbenă),
- 9 réserves de plantes médicinales (Cahul, Cernoleuca, Bugeac) et
- 3 mixtes (Cantemir, Crocmaz).

Les réserves paysagères représentent des territoires naturels délimités dans le but d'harmoniser les relations entre l'homme et la nature, en préservant les paysages géographiques pour la génération actuelle et les générations futures.

Il existe 41 réserves paysagères en Moldavie, la plus grande étant «Pădurea din Hâncești», Les paysages représentatifs se trouvent à «Pădurea Hârbovăț», «Valea Adâncă», «Codrii Tigheci», «Rudi-Arionești», «La Castel», Fetești, Saharna, Cosăuți, Căpriana, le complexe géo-paléontologique du bassin de la rivière Lopatnic, etc.

Les réserves de ressources représentent des objectifs spécifiques pour l'écotourisme, car le potentiel naturel stocké dans certains territoires est exploité.

Une gamme variée de sols est attestée sur le territoire de la Moldavie, ici il y a environ 745 types de sols différents, la principale richesse pour l'agriculture étant le chernozem, qui occupe environ 80% du territoire du pays. Ainsi, en République de Moldova, 13 réserves pédologiques représentatives sont protégées par l'État, par exemple à Talmaza, dans le bassin du Bas Dniestr. Les zones à gestion multifonctionnelle sont des zones où, parallèlement à la conservation des ressources en eau et des pâturages, un tourisme réglementé est pratiqué.

Les steppes herbeuses et les formations de prairies occupent 11,3% du territoire du pays. La réglementation de ces zones suppose également la pratique de l'écotourisme. 32 zones de ce type sont réservées en Moldavie :

- 25 secteurs représentatifs à végétation de prairie, à proximité de rivières et ruisseaux, par exemple, dans le périmètre de la réserve «Codri» ;
- 5 secteurs représentatifs à végétation steppique.

En Moldova, il existe deux grandes zones de steppe: la steppe Bălțiului et la steppe Bugeacului, qui traversent pratiquement toutes deux du Prut au Dniestr;

- 2 systèmes de rideaux forestiers, qui sont sous protection, en particulier dans les zones du sud de la Moldavie :

Les monuments naturels sont des objectifs isolés, intéressants pour les visites touristiques, mais qui sont dispersés dans tout le pays. Sous protection d'État sont plus de 500 objectifs, des rochers et des grottes aux sources et aux plantes séparées. Actuellement on distingue:

- ✓ 86 monuments naturels géologiques et paléontologiques (grotte «Emil Racoviță», gorges de Fetești, gorges de Butești, gorges de Trinca, gorges de Naslavcea, gorges de Duruitoarei, etc.),
- ✓ 31 monuments naturels hydrologiques, qui comprennent la plupart des sources d'eau minérale ou à haute couler;
- ✓ 446 monuments botaniques de secteurs représentatifs à végétation forestière, par exemple, des arbres centenaires protégés, comme le Châtaigne de Ștefan cel Mare de Cobâlnea.

Conclusion.

Le tourisme écologique représente pour la République de Moldova une forme de tourisme de niche, bien que le pays dispose d'un potentiel naturel riche et diversifié, il n'est pas exploité à sa juste valeur. Bien que, à l'heure actuelle, cette forme de tourisme soit peu développée et promue, avec certains changements entrepris et la création d'un plan stratégique dans cette direction, l'écotourisme peut devenir une branche d'activité touristique prospère sur le marché du tourisme national et international.

Afin d'améliorer la situation du tourisme écologique en République de Moldova, les orientations stratégiques suivantes seraient les bienvenues:

- l'élaboration de la loi sur l'écotourisme ou complément de la législation en vigueur avec un chapitre distinct sur l'écotourisme, ainsi qu'harmonisation de la législation écologique en vigueur selon les normes internationales;
- la mise en place d'un programme de sensibilisation au niveau des autorités locales et de la population;
- le strict respect de la législation environnementale et le développement d'un système moderne et écologique d'accueil touristique dans des zones à forte attractivité;
- la mise en œuvre d'un programme de sensibilisation au niveau des autorités locales et de la population et formation de la population dans le domaine de l'écotourisme;
- l'élaboration de programmes de coopération locale, nationale et régionale dans le domaine de l'écotourisme;
- l'élaboration de matériel promotionnel concernant l'offre de la République de Moldova dans le domaine de l'écotourisme;
- le strict respect de la législation environnementale et le développement d'un système moderne et écologique d'accueil touristique dans des zones à forte attractivité;
- l'élaboration et mise en œuvre d'un programme de marketing écotouristique basé sur des études de marché.

Bibliographie

1. E., Matei, Ecoturism. Editura Universitară. Chișinău, 2015.
2. C., Manolache, Itinerar ecologic. Chișinău, 2001.
3. David A., Fennell, Ecotourism an introduction. London, Routlege, 2002.
4. M., Honey, Ecotourism and Sustainable Development. 2nd edition, 2008.
5. David A., Fennell, Ecotourism. 4th edition, Routlege, 2015.
6. J.S., Smaranda, Managementul turismului în ariile naturale protejate, Editura Risoprint, Cluj-Napoca, 2008
7. V., Miron, Miron M., E., Melnicenco, Turismul Verde în Moldova. Chișinău, 2017
8. Ecotourism: Principles, Practices&Policies for Sustainability. The International Ecotourism Society. UNEP, 2002.
9. World Tourism Organisation, International Tourism Highlights, 2020 edition.
10. Center for Responsible Travel (CREST). Accedé: le 15.03.2021. Disponibile: https://www.responsibletravel.org/

ISBN: 978-2-931089-30-9

Sostenibilità del turismo di genere. Dalle motivazioni storiche del Tour ai nuovi modelli di acquisto

Francesco FAVIA*
IARC-USC International Academic Research Center - Albania

Abstract: The object of this work, developed and perfected for some time, deals with the theme of gender tourism in a 360-degree view of the reasons and needs of its existence. The topic is developed starting from its historical, semantic, socio-economic, social and territorial manifestations.
The topic takes its origins from the prose and poetry of the Classical Period where the genre was not considered as such but was part of everyday life and then moved on to the Grand Tour, prerogative of the noble classes or well-known writers and artists, in search of places where to be able to freely express one's nature. An analysis of the territories and, within them, of the most welcoming places and of how "hospitality" generates economic flows within the country.
An analysis of the variations in the purchasing model and how it has changed in recent years thanks to a series of social battles that have been won.
The question mark, however, always remains the same, how useful and advantageous is the classification of a gender tourism in reality for its members?

Keywords: Gender Tourism, Quality, Hospitality.

Premessa

Non potremmo comprendere il senso del Turismo LGBT se prima non comprendessimo il senso stesso della vacanza e del turismo in genere senza poter prescindere dagli aspetti di territori in cui affondano le radici stesse della cultura dell'uomo e della sua libertà e/o liberismo.

Turismo - definizione

L'insieme di attività e di servizi a carattere polivalente che si riferiscono al trasferimento temporaneo di persone dalla località di abituale residenza ad altra località per fini di svago, distrazione, cultura, cura, sport, ecc.;

*Fa **turismo** chiunque viaggi in paesi diversi da quello in cui ha la sua residenza abituale, al di fuori del proprio ambiente quotidiano, per un periodo di almeno una notte ma non superiore ad un anno e il cui scopo abituale sia diverso dall'esercizio di ogni attività remunerata all'interno del paese visitato.* ***(WTO – ONU)***

Per avere turismo dobbiamo quindi avere un viaggio; il viaggio è un momento di manifestazione di potere e di arricchimento sociale perché per avere un viaggio dobbiamo avere una vacanza.

La vacanza prevede la possibilità economica di potersi permettere di non lavorare senza avere problemi economici o finanziari.

* Corresponding Author: ffavia@me.com

Dal turismo ai turismi

La letteratura oggi tende a parlare di turismi poiché ci si è resi conto di nuove esigenze e di nuovi target, per cui il turismo è mutato, ampliando il suo raggio d'azione.

Tale evoluzione ha favorito la nascita del marketing esperienziale, una particolare branca del marketing attinente all'analisi, creazione e trasferimento del valore estratto da esperienze: le sue nozioni hanno permesso alle agenzie di viaggi, ai locali di intrattenimento e alle istituzioni culturali di ridefinirsi a partire dalla segmentazione della domanda, cercando di realizzare profitti su "nicchie" del mercato un tempo trascurate.

Una di queste è il mondo omosessuale, con la conseguente definizione di un vero e proprio *turismo LGBT*.

L'ascesa di tale forma di turismo, nonché il concetto stesso di "turismo LGBT", ha sollevato controversie in parte dell'opinione pubblica e dei media nazionali. Infatti da anni in Italia si ha una dialettica vivace tra chi lo sostiene apertamente in quanto forma di progresso nel processo di accettazione sociale delle minoranze sessuali e chi invece ritiene che sia una mera mercificazione delle differenze, con esiti discriminatori "invertiti". Esprimere un giudizio netto di valore, come se si potesse rispondere a questo quesito con un "vero" o un "falso", è impossibile e inattendibile: ciò che è più opportuno è assumere un atteggiamento fenomenologico misto a uno sguardo antropologico sulla realtà.

Innanzitutto è opportuno constatare che la diffusione del marchio non ufficiale del "gay friendly", con cui molte città ed enti turistici si stanno promuovendo in Italia e nel resto del mondo, sta portando a un cambiamento degli spazi urbani. Prendendo a esempio Milano, la creazione nel corso dei decenni di appositi bar e discoteche LGBT ha mutato fortemente determinate zone, favorendo la loro rivitalizzazione economica e riqualificazione territoriale. Si sono create così aree di "tolleranza di mercato", con cui si può affermare che almeno per queste realtà turistiche si sta registrando un progresso nel percorso di accettazione della comunità.

LGBTQI+: Acronimo

- Lesbian
- Gay
- Bisexual
- Transgender
- Queer
- Intersex
- + (che rappresenta tutti coloro che fanno parte della comunità, ma non si riconoscono pienamente in nessuna delle identità precedentemente citate)

Il turista LGBTQI+ è un soggetto che cerca nella vacanza un momento identitario dove sentirsi accolto in un territorio e in una comunità, mentre il turismo LGBTQI+ è un sistema di accoglienza rivolto principalmente alle persone gay, lesbiche, bisex, trans* e queer.

Le aziende che operano in questo settore si rivolgono apertamente al viaggiatore LGBTQI+ con comunicazioni e servizi dedicati. Si impegnano nella creazione di ambienti inclusivi e nella diffusione di buone pratiche basate sul principio di non discriminazione anche presso tutte le aziende della filiera con cui collaborano.[1]

Il Mediterraneo e le Friendly Zone

Parliamo del mondo Greco Classico e dell'Antica Roma compresi i principali territori dove gli stessi hanno dominato militarmente e culturalmente.

La ricerca di luoghi friendly dette finalmente corpo a quello che fu senz'altro il **topos** per eccellenza della nostra cultura occidentale, esistente già nella mitologia greca e decantato da moltissimi intellettuali, fin dal VII sec. A.C., una per tutte Saffo di Lesbo che parla essenzialmente di "libertà" e della libertà di ciò che si ama

[1] AITGL Italia - manuale del turismo LGTBQ+ 2020

Saffo afferma in termini assoluti la superiorità del sentimento e confuta l'esistenza di una scala oggettiva di valori in favore di una scelta operata dall'individuo.

Saffo è stata la prima a cantare e a dare importanza all'amore omosessuale, si può notare anche come Saffo stessa possa essere considerata una sorta di femminista ante litteram. Nell'antica Grecia era contemplata di norma l'iniziazione all'amore omosessuale per il passaggio alla maturità (come anche testimoniato anche dai coetanei di sesso maschile), e questa non pregiudicava affatto, anzi completava il futuro amore eterosessuale. Tuttavia, questo ruolo educativo, frainteso ed isolato, ha alimentato sin dall'antichità la fama di una Saffo omosessuale e erotomane, che ha generato i moderni "lesbica" e "saffico" per indicare l'omosessualità femminile, allo stesso tempo condizionando di molto la fortuna della poetessa.

Saffo, mitizzata dalle molteplici trasformazioni di vereconda direttrice di un collegio femminile o di prostituta, o di femminista, offre un'immagine semplice ed appassionata dei propri sentimenti, equilibrata e coinvolgente, dove l'amore ricopre un ruolo di primo piano. Forza emotiva si coniuga con l'eleganza e la dolcezza delle espressioni. Potenza della passione e soavità della tonalità. Nessuno prima di lei ha indagato sulle emozioni di una donna innamorata e non a caso quest'introspezione vede la sostanziale indifferenza per le condizioni femminili storico-culturali del tempo.

Grand Tour

Le origini di questa ricerca di territori ed identità parte con il Gran Tour alla ricerca delle radici in quei luoghi dove fin dall'antichità non si parlava di esclusività di genere ma solo di amore. Sarebbe ovviamente un clamoroso e fuorviante errore pensare che tutti i viaggiatori del **Gran Tour** siano stati omosessuali. Però è innegabile che in percentuale essi furono proprio molti e non è certo difficile spiegare il perché. William Beckford, scrisse (cfr. **Babilonia** n. 207) che il Mediterraneo "era un posto per peccatori di una particolare specie". D'altra parte tutto ciò ha una logica. Mentre in Inghilterra, la cultura vittoriana reprimeva ogni comportamento che trasgredisse le rigorose regole del perbenismo sociale, furono in molti a trasferirsi volontariamente in Italia o in altri nazioni mediterranee; qui misero finalmente a nudo le proprie inclinazioni, proibite nei propri paesi, trovando così un nuovo modo di essere, scevro da condizionamenti sociali e inteso al pieno soddisfacimento epicureista di tutti i sensi.

Scelte, queste, che alla fine pagavano, visto che nella Grecia di Saffo e di Platone e nella "terra dei romani dai facili costumi" era possibile esperire ogni cosa, senza particolari sforzi, all'ombra di una concezione di massima libertà sessuale, aperta ad ogni esperienza: non era infatti certo difficile trovare la disponibilità fisica di splendidi ragazzi e ragazze (già un francese, sbarcato a Capri nel 1632, raccontò come *"le donne e i ragazzini vi fanno volentieri la cortesia ai viaggiatori stranieri"*), quasi sempre, ovviamente, delle classi più umili. Il ricco poteva consumare un rapporto privilegiato con *l'oggetto* concupito del proprio desiderio, mentre le famiglie apprezzavano i benefici derivanti, in particolare sul piano economico.

Scrive Norman Douglas nel 1897 *...."Il ragazzo si innamorò di me disperatamente, come solo può farlo un ragazzo meridionale di quell'età; ……. E la cosa più strana, (strana cioè per la nostra mentalità inglese) è che ciò non sorprese minimamente né sua madre né sua sorella; la giudicarono la cosa più normale del mondo" ……*

Il fenomeno riguardò ovviamente tutta l'Italia - si pensi a Lord Byron a Venezia - ma trovò il suo luogo privilegiato nel Mezzogiorno, a cominciare dagli ultimi decenni del Settecento. Fu attorno a quegli anni, infatti, che i viaggiatori, prima poco preoccupati di interessarsi alle popolazioni locali, complice il fenomeno del banditismo (dell'Italia si diceva *"un paradiso occupato da diavoli"*), iniziarono a comunicare con esse, descritte come poi come *"maestre dell'arte del vivere"*. Il fenomeno riguardò molto da vicino l'Italia del Sud e coinvolse molte brillanti personalità dell'epoca, come Oscar Wilde, George Byron, Winckelmann, Marcel Proust etc.…

Fra le mete più gettonate Capri e Taormina. L'appeal dell'Italia come luogo privilegiato per l'omoerotismo durò fino agli anni '50 del '900 quando sopravvenute circostanze politiche e sociali resero impraticabile il "sogno di libertà" degli intellettuali di fine secolo e nuovi spazi mediterranei emersero come nuove "culle del mito": es. Mykonos e Ibiza

 ISBN: 978-2-931089-30-9

In tutto ciò possiamo notare che il turismo LGTB è prevalentemente coniugato al maschile e appartiene a classi intellettuali e/o benestanti.

Il turismo omosessuale si struttura intorno a una netta distinzione, quasi una contrapposizione, fra quella omofobica del paese di origine se non della stessa famiglia e una destinazione di libertà anche sessuale, per cui il turismo omosessuale diventa un viaggio simile a una fuga alla ricerca di un luogo "friendly" nel quale la relazione omosessuale fosse accettata.

Il turismo omosessuale di fine '800 investiva di significati "mitici" luoghi come il Marocco, l'Egitto e il Mediterraneo in generale, associandoli con stili di vita "emancipati" e incorporandoli in grandi narrazioni romantiche che offrivano rappresentazioni di società libere e non repressive. Questo tipo di turismo, geograficamente "marginale", pertanto, comportava viaggi su una lunga distanza e lasciava sostanzialmente intatta l'omofobia, dei luoghi di origine dei viaggiatori, non mettendone in discussione lo status quo. In particolare, lo spazio della vacanza era ed è importante per coloro che nell'ambiente di origine, sono privati della possibilità di uno spazio e di una comunità nel quale identificarsi.

La comunità gay si ritrova infatti spesso nel paradosso di essere ospiti in casa propria e in tal senso il viaggio diventa un atto identitario, in quanto azione di liberazione

Siamo partiti dal mondo classico per passare al Gran Tour, adesso torniamo ai nostri tempi.

City break

Uno dei fenomeni di forte "consumo" di City Break (fuga di breve periodo dalla città di residenza) verso spazi altri urbani è legato al fenomeno del Turismo LGTB. L'insediamento di questo fenomeno favorito dall'accettazione del territorio verso questo forma di turismo. Accettazione del territorio e/o friendly zone; è opportuno ampliare le friendly zone con cui molte città ed enti turistici si stanno promuovendo in tutto il mondo e che sta portando a **un cambiamento degli spazi urbani**.

Si stanno creando aree di "**tolleranza di mercato**", con cui si può affermare che almeno per queste realtà turistiche si sta registrando un progresso nel percorso di accettazione della comunità.

Ciò crea dunque **un'occasione di uscita dalle tradizionali linee di forza** che vincolavano la circolazione e la libertà delle coppie omosessuali, nonché una chance di messa in discussione dell'omofobia patriarcale: la città diventa così teatro dei cambiamenti politici, come accade peraltro in altre aree metropolitane di Italia e del resto del mondo (alla stregua della polis dell'Antica Grecia, fulcro dell'attività politica).

Tali cambiamenti però hanno **il difetto principale** di restringersi spesso e volentieri a determinati quartieri, come il centro storico o le zone più "alternative/bohème", generando allo stesso tempo **luoghi di ghettizzazione involontaria**.

Il rischio tangibile è pertanto che il turismo LGBT diventi strumento promozionale del prestigio internazionale di una città senza ridurre realmente il gap tra una narrazione progressista di élite e la matrice discorsiva al cuore della metropoli stessa intendendo tutte le pratiche sociali afferenti alla cultura di una comunità che ne rappresentano discorsivamente la realtà sociale più profonda, con tutte le sue disuguaglianze.

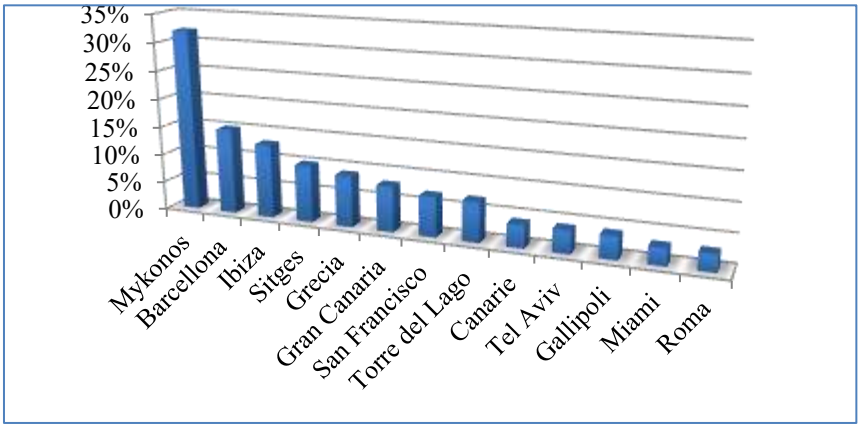
Si pensi ai **processi tipici di alienazione urbana**, in cui il capitale sociale, la reputazione e la cultura costituiscono grandi fattori discriminanti all'accesso della vita economica.

È pressoché impossibile fornire una risposta univoca su cosa sia una destinazione LGBT friendly tuttavia, è possibile elencare una lista di fattori a cui è possibile a vario titolo associarle:

- apertura, accoglienza e rispetto da parte della comunità locale
- piena difesa dei diritti umani
- normativa a favore dei diritti delle persone LGBT e contro qualsiasi forma di discriminazione
- sicurezza
- presenza di un'ampia e riconosciuta comunità locale LGBT
- uso di una comunicazione inclusiva
- disponibilità di informazioni specifiche per i viaggiatori LGBT

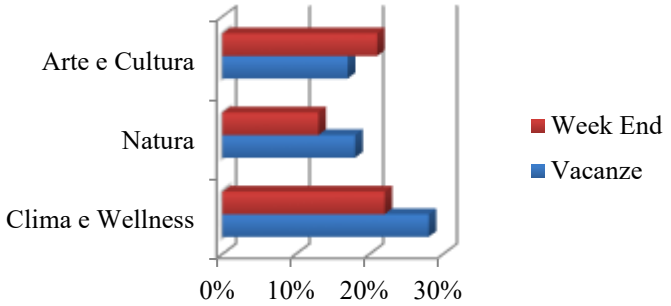
- presenza di turisti LGBT
- presenza di strutture LGBT friendly

Mete Preferite secondo i dati dell'Osservatorio europeo di AIGO e Pangaea Networks sono:



I luoghi di destinazione devono avere un ottimo sistema di infrastrutture e, nonostante la loro importanza all'interno dell'immaginario collettivo gay, sono a volte spazi periferici, seppur all'interno di grandi città che possono rappresentare attrazioni turistiche anche per eterosessuali.

Il turista LGBT sceglie dove andare in base al clima, alla cucina e al benessere.



I paesi da evitare per viaggiare sereni

Il turismo LGBT, ormai diventato anche un business interessante in molte parti del mondo, è invece più rischioso in altre.

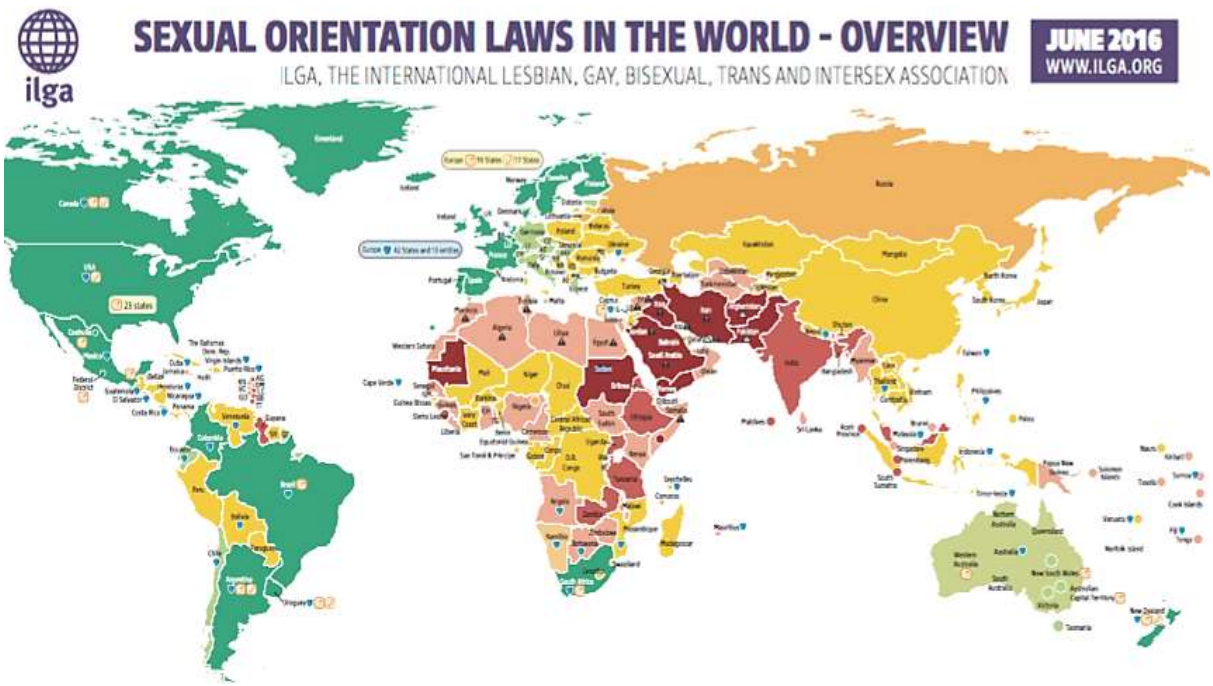
Da una ricerca di ILGA emerge che mentre nella maggior parte dell'Asia l'omosessualità è reato, ma comunque bene o male tollerata fino a che rimane in sordina, in quasi tutti i paesi africani essere "queer" può essere un grosso problema e un rischio per la propria incolumità.

Pena di morte o detenzione: sono ancora molti gli stati che prevedono punizioni esemplari per omosessuali e transessuali, costringendo molti a fuggire. La **pena capitale è prevista in 13 paesi**, distribuiti tra Asia e Africa, mentre sono **decine gli stati in cui vi è la detenzione**, in 14 stati l'ergastolo o il massimo della pena[2].

L'omofobia in Africa, pur essendo stata importata con la colonizzazione, oggi è più radicata che in qualsiasi altra parte del mondo, naturalmente con le dovute eccezioni, e differenze tra Stato e Stato. Dalla **Tunisia** sono arrivati alle cronache di tutto il mondo i cartelli che alcuni negozi hanno esposto vietando l'ingresso agli omosessuali. La vicenda ha suscitato una discreta polemica, con la comparsa anche di cartelli in contrapposizione a quelli omofobici, ma comunque la Tunisia rimane un paese estremamente dogmatico in termini di orientamento sessuale e sconsigliato a turisti LGBT che non vogliono avere problemi.

[2] ILGA pubblicato su Associazione Carta di Roma 15 giugno 2016

 ISBN: 978-2-931089-30-9



Anche l'**Egitto** è sulla stessa linea, come saprà chi si ricorda della vicenda della Queen Boat, ormai risalente al 2001, quando 52 presunti omosessuali furono picchiati e arrestati in un raid notturno nel pub allestito sulla barca Queen Boat. Le cose non sono cambiate molto da allora e viaggiare in Egitto, così come in Tunisia, può risultare rischioso per turisti LGBT.

Sorprendentemente aperta è invece Beirut, nonostante la legge libanese vieti ufficialmente l'omosessualità, parimenti potrebbe sorprendere anche sapere che il paese che offre la più alta qualità di vita a una persona LGBT in Medioriente è Israele.

A parte queste due eccezioni però **la vita è difficile in Medioriente** per chi non è eterosessuale, per esempio in Iran che è uno dei sette Paesi che ancora puniscono l'omosessualità con la morte, insieme a Yemen e Nigeria uno dei Paesi più omofobici del mondo, Arabia Saudita, Emirati Arabi Uniti, Mauritania e Sudan.

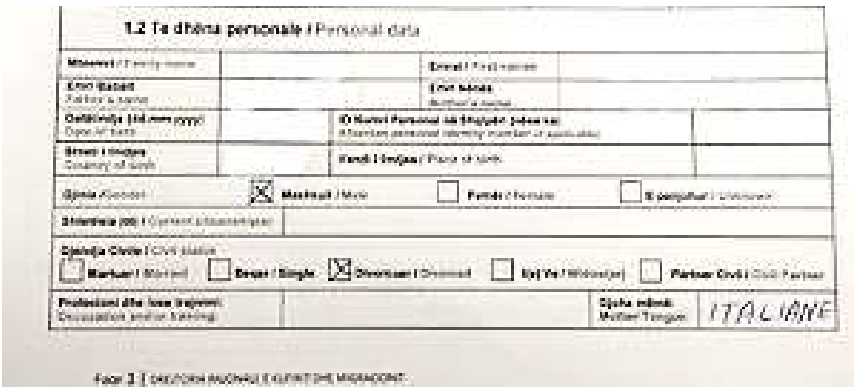
In America Latina, invece, i diritti LGBT sono ampiamente riconosciuti. L'unica eccezione è il Guyana, dove l'omosessualità è ancora illegale. In linea di massima, comunque, **il Sudamerica è sicuro** per il turismo LGBT.

Ha suscitato grande attenzione quanto accade a **BANGKOK.** Il principe indiano **Manvendra Singh Gohil,** ultimo erede e primo gay di un'antica dinastia di Maharaja induisti del Gujarat ha annunciato la volontà di mettere a disposizione 7 ettari di terreno per tutte le persone della comunità Lgbt in fuga da familiari oppressivi, da ritorsioni e dalla persecuzione di una legge di fine '800, anche se raramente è stata applicata dopo il suo ripristino nel 2013.

Manvendra stesso che era stato vittima del pregiudizio, ha creato la **Lakshya Trust** per i diritti Lgbt e in questi giorni ha già messo a disposizione la sua reggia come primo dei numerosi edifici nei quali vuole ospitare chiunque cercherà rifugio per motivi di discriminazione sessuale. Il Maharaja ha cercato di creare la patria ideale descritta dalla Costituzione indiana e già evocata in alcune sentenze della Corte, ma finora irrealistica. Il suo mini-regno è una sorta di terra promessa per gay e transgender che potrebbe diventare un'oasi di culto internazionale.

Molti prevedono che la sua oasi di pochi ettari sarà presto un grande cantiere in lavorazione, una sorta di stazione sperimentale dei limiti sociali della tolleranza a prescindere dalla liberalità o meno delle leggi su carta.

In Europa sono presenti aree con forti contraddizioni; ad esempio l'Albania dove non è ancora chiaro quanto il "pensiero della collettività" accetti con disinvoltura il turismo LGTB al contrario la pubblica amministrazione mostra in "atti" una maggiore attenzione. A dimostrazione di ciò possiamo esaminare un estratto del modulo di richiesta del permesso di soggiorno dove alla sezione "genere", oltre il classico Maschio-Femmina è prevista una terza casella con l'indicazione sconosciuto/non identificato.



Stereotipi e contesto socio-politico

Una premessa necessaria riguarda alcuni stereotipi legati al mercato LGBTQ+: questa sigla non identifica solo gay e lesbiche e soprattutto non rappresenta un blocco compatto e omogeneo di persone, ma una comunità composta da sottogruppi e individui, ognuno con caratteristiche ed esigenze specifiche, che andrebbero quanto meno conosciute.

Il profilo del turista LGBT:

- È prevalentemente maschio ed ha un'età fra 18 e i 35 anni;
- È diplomato o laureato;
- Svolge un lavoro come imprenditore, quadro o libero professionista;
- Spende il 40% in più di un turista etero (fra i 4.000 e i 6.000 euro);
- Abita in città medio-grandi e in aree metropolitane;
- I mesi preferiti per fare turismo sono febbraio, settembre e ottobre;
- Il 28% visita una località già frequentata per lavoro;
- Fa da 2 a 5 periodi di vacanza l'anno (70%);
- Il rapporto qualità/prezzo è una delle principali variabili nella scelta.

I turisti LGBTQ+ vengono sempre identificati come **DINK** (dual income no kids), per cui il modello di spesa si identifica nello stesso modo.

È vero anche che i dati indicano sempre i viaggiatori gay come più assidui, numerosi e spendenti delle viaggiatrici lesbiche, soprattutto perché spesso le coppie femminili vengono scambiate per coppie di amiche, anche quando viaggiano in famiglia, con i bambini.

Linee guida per approcciarsi al mercato LGBTQ+

- Stando ai dati, prenotare un viaggio è la prima delle Top 10 attività online per gli utenti LGBTQ+ e lo fanno mediamente dopo aver consultato 3-4 siti specializzati, tra cui magazine e blog di riferimento per la comunità.
- Il 52% considera molto importante che la struttura ricettiva si dichiari gay friendly e filtra in base a questo anche prenotando sulle piattaforme di booking.
- La spunta sull'opzione "gay friendly" però non basta. Come per qualsiasi strategia di marketing, occorre metterla in atto sia online che offline e con cognizione di causa.
- Si può partire dall'identità visiva aziendale, declinandola come hanno fatto Accor e altri grandi brand, utilizzando immagini inclusive sui media a disposizione, portando avanti una comunicazione dedicata sui social network e nelle campagne pubblicitarie, proponendo offerte e pacchetti ad hoc e idealmente puntando su servizi specifici, come lo si farebbe per qualsiasi altro target.
- In loco è poi opportuno un confronto con lo staff, per metterlo al corrente delle strategie adottate ed eventualmente puntando a un minimo di formazione e informazione, utile a evitare gaffes al check-in. La più banale e, stando alle conversazioni online, più frequente è

 ISBN: 978-2-931089-30-9

l'offerta della twin. Se i clienti la desiderano la richiedono, se si presentano al check-in avendo prenotato una matrimoniale vuol dire che va bene così…

- Altri scambi evitabili sono relativi all'essere fratelli/sorelle quando la coppia ha lo stesso cognome sui documenti, un po' come quando una donna è in sovrappeso e le viene chiesto se è in dolce attesa. Sembrano assurdità, ma sono cose che capitano di frequente e onde evitarlo basta un minimo di formazione.
- Sempre in loco, un'accortezza semplice, ma dagli ottimi risultati è relativa ai kit di accoglienza nelle camere: quando si ospitano due uomini è buona norma prevedere due accappatoi taglia uomo e kit rasatura doppio, come doppio vanity kit per due donne e altri dettagli di questo tipo, in grado di fare la differenza.

Quanto vale il mercato del turismo LGBT

Secondo lo studio LGBT2030 condotto dalla società di consulenza *Out Now*, il turismo LGBT a livello globale vale almeno 211 miliardi di dollari l'anno.

Il dato è stimato a seguito di un'indagine condotta nel 2016 su un campione di 130.000 persone LGBT residenti in 18 paesi considerati importanti mercati di origine dei flussi per questo segmento di turismo. Ad eccezione dei turisti provenienti da Italia e Argentina (che comunque rimangono mercati importanti), la spesa in viaggi risulta aumentata rispetto ai 3 anni precedenti per tutti i paesi considerati.

Usa	63.1 USD$bn	+1.9
Brazil	26.8 USD$bn	+0.8
Japan	20.7 USD$bn	+0.9
Germany	13.8 USD$bn	+2.0
UK	11.7 USD$bn	+1.6
France	11.4 USD$bn	+1.0
Mexico	11.4 USD$bn	+3.3
Italy	9 USD$bn	+0.1
Canada	7.1 USD$bn	+1.7
Spain	7 USD$bn	+1.4
Australia	6.9 USD$bn	+2.8
Turkey	6.6 USD$bn	+3.0
Colombia	5.1 USD$bn	+2.4
Poland	4.7 USD$bn	+3.3
India	4.7 USD$bn	+7.2
Argentina	4.3 USD$bn	+1.6
Netherlands	3 USD$bn	+1.4
Israel	1.4 USD$bn	+3.0

Il Mercato italiano è una tra le realtà in ascesa dell'industria dell'accoglienza del Terzo Millennio. Anche qui in Italia: su 60 milioni di visitatori che ogni anno toccano il nostro Paese, si stima che dai 3 ai 6 milioni appartengano alla comunità gay. In Italia, secondo i dati della società GFK Eurisko, i ricavi sono stimati tra i 2,5 e i 2,7 miliardi di euro e si prevede anche un aumento in seguito all'introduzione della legge sulle unioni civili. Inoltre le ricerche di mercato di GFK dimostrano che i turisti gay italiani presentano mediamente determinate caratteristiche che ne influenzano le scelte di acquisto e consumo: prevalentemente sono maschi e in una fascia di età 18-35 anni, abitano in città e in aree metropolitane del Nord-Italia, sono per lo più diplomati e laureati, spendono più del 40% di un turista eterosessuale e investono molto su benessere, intrattenimento e cultura.

Mentre secondo le analisi di AITGL Italia, il turismo LGBTQ+ vale 2,7 miliardi di euro. I viaggiatori LGBTQ+ hanno mediamente una maggiore capacità di spesa (reddito superiore del 38% rispetto agli eterosessuali) e un'alta propensione al viaggio (4/5 viaggi di media all'anno). Inoltre, prediligono le aziende che si rivolgono apertamente alla loro comunità, premiandole con un alto tasso di fidelizzazione. Eppure, le aziende ed istituzioni turistiche che operano in questo settore sono pochissime. I motivi sono diversi, ma ciò che incide soprattutto è l'arretratezza etico-sociale che affligge da tempo l'Italia anche se in questo caso ci viene incontro la politica e le istituzioni

pubbliche per supportare la cultura della libertà; il primo caso in Italia lo abbiamo a Firenze dove il Comune prevede la campagna di sensibilizzazione nei confronti del turismo lanciando dei corsi gay friendly di coinvolgimento per alberghi e ristoranti con lo scopo di promuovere il turismo omosessuale e un'accoglienza "gay friendly".

Occorre poi tenere a mente che si tratta di dati sottostimati in quanto non è così semplice chiedere la sessualità alle persone che rispondono ai sondaggi (in molti paesi è proprio illegale) e poi esiste un grande numero di persone LGBTQ+ che semplicemente non ha fatto coming out…

Per sviluppare questo mercato, come destinazione, struttura ricettiva o provider di attività ed esperienze turistiche, non si può non tener conto dell'influenza che accettazione sociale, diritti umani e legislazione locale esercitano sulla comunità.

Cosa dobbiamo considerare GAY Friendly

Prima di tutto vige il principio di uguaglianza. Nel 2006 si è tenuta una conferenza a Yogyakarta, in Indonesia. Questa conferenza ha dato origine ai principi di Yogyakarta, che prevedono l'attuazione della legge internazionale sui diritti umani in relazione all'orientamento sessuale e identità di genere. Tra questi l'obbligo di garantire il diritto all'uguaglianza e alla non discriminazione. Ma già 10 anni prima nel 1996 il BITS emanava la dichiarazione di Montreal riprendendo la dichiarazione dei diritti dell'uomo che all'art.2 cita *"L'obiettivo fondamentale di qualsiasi azione di sviluppo turistico deve consistere nella piena realizzazione dell'individuo come persona e come cittadino*" e ancora all'art.3 *"L'aspirazione di permettere a tutti di accedere al Turismo Sociale impegna necessariamente a lottare contro le ineguaglianze e contro l'esclusione di tutti coloro che hanno una cultura diversa, dispongono di minori mezzi finanziari, hanno capacità fisiche ridotte o vivono in un paese in via di sviluppo".*

Sembra che si crei ridondanza di principi tra diverse organizzazioni internazionali, ma ricordiamo che si tratta sempre di principi.

Assunto fondamentale di AITGL si concretizza nella "prima regola che è il ***buon senso*** e il ***rispetto*** dell'altro/a". Come non essere d'accordo su questo? Ma anche sul resto:

- Il rispetto è fondamentale in tutte le relazioni personali. Può sembrare banale, ma questa è la regola più importante in ogni servizio: non trattare gli altri e le altre con superiorità.
- Agisci con la cortesia e la naturalezza che tutti meritano.

Così quando usiamo una comunicazione non verbale dovremmo:

- non fissare troppo le altre persone;
- non distogliere lo sguardo;
- rivolgere lo sguardo verso il proprio interlocutore;
- non cambiare il tono della voce;
- non passare davanti ad altre persone, ignorandole.

Ma queste sono regole che valgono nei confronti di chiunque; l'attenzione va posta su *"ciò che di diverso attira la nostra attenzione"* utilizzando modi e linguaggi appropriati e questa regola, vale tanto per i turisti di LGTBQ+ ma anche per chiunque abbia un andicap fisico o intellettivo, sia obeso o anoressico, albino o calvo, etc.

Ovviamente nessuno dovrebbe usare terminologie offensive, però dobbiamo stare attenti anche a non demonizzare gli slang o i luoghi comuni che appartengono ai linguaggi di ciascun territorio

Promozioni riservate alle coppie o alle famiglie

Partendo dal profilo del nostro turista LGBT che viene spesso identificato come Dink (vedi sopra) dobbiamo cominciare a pensare ad un nuovo modello d'acquisto per tutte le coppie con figli naturali o adottati passando quindi dal modello di spesa "***coppie senza figli***" al modello "***coppie con figli***" siamo essi bambini/adolescenti o ***famiglia*** (coppie con figli adulti).

Nel caso in cui ci siano promozioni speciali per le coppie o per le famiglie, estendere il beneficio anche alle coppie o famiglie omosessuali o formate anche da persone trans.

Ma come già detto, se si tratta di due donne con figli quale modello di spesa applichiamo? Siamo in grado di comprendere se si tratta di una famiglia? Ancora, come distinguere due padri single con figli? Il problema dell'identificazione senza un coming out resta. Da considerare che a volte il coming out non è voluto per questioni di riservatezza della coppia o perché ci si trova in territori ostili.

 ISBN: 978-2-931089-30-9

Torniamo all'argomento famiglie.
A dicembre 2021, il matrimonio ugualitario è permesso in 32 Paesi del mondo *(Wikipedia):*

Argentina, Australia, Austria, Belgio, Brasile, Canada, Colombia, Costa Rica, Cile, Malta, Danimarca, Ecuador, Finlandia, Francia, Germania, Irlanda, Islanda, Lussemburgo; la maggior parte del Messico, Norvegia, Nuova Zelanda, Portogallo, Regno Unito, Spagna, USA, Sudafrica, Svezia, Svizzera, Taiwan e Uruguay e nella componente europea del Regno dei Paesi Bassi, mentre nelle altre sue tre nazioni costitutive (Aruba, Curaçao e Sint Maarten) così come in Israele, pur non essendo il matrimonio disciplinato per legge, è permesso alle coppie dello stesso sesso coniugate altrove di registrarvi il proprio matrimonio.

Inoltre, Estonia e Armenia riconoscono i matrimoni omosessuali celebrati all'estero sotto alcuni aspetti.

Laddove esiste il matrimonio egualitario, come l'adozione per coppie dello stesso sesso, ovviamente le strategie turistiche relative al mercato LGBTQ+ hanno maggiore successo. Oltre ai vantaggi economici diretti poi si riscontra una maggiore positività del brand turistico, associato a un'immagine di progresso e tolleranza che apre automaticamente ai flussi delle altre minoranze.

In altri Paesi quali Italia, Andorra, Cipro, Croazia, Grecia, Liechtenstein, Repubblica Ceca, San-Marino, Slovenia e Ungheria esistono discipline diverse dal matrimonio: esiste infatti, per le coppie omosessuali, la facoltà di accedere alle unioni civili, con inclusa o meno la possibilità di adottare il figlio del partner.

Inoltre, alcune città e contee in Cambogia e Giappone offrono alcuni benefici alle coppie omosessuali, come il diritto di visita ospedaliera.

Le coppie dello stesso sesso possono accedere all'adozione di minori in 29 dei summenzionati paesi. L'adozione da parte di coppie dello stesso sesso è inoltre legale in alcune giurisdizioni del Messico.

Altri Paesi, pur non consentendo l'adozione di minori da parte di coppie dello stesso sesso, riconoscono a chi è in coppia con una persona di sesso uguale l'adozione dei figli naturali e adottivi del partner; tra questi vi sono l'Estonia e Slovenia

In pratica parliamo di forme di tutela o riconoscimento in 48 paesi su 193 dei componenti dell'ONU. Casualmente, nessuno di questi paesi è di matrice islamica.

Riassumendo:

Il turismo LGBT non è di per sé positivo o negativo, bensì presenta vari chiaroscuri. Ci sono strutture e/o territori che cercano di fare politiche GAY Friendly, cosi come chi cerca di fare politiche Muslim Friendly. Questo si sta già verificano in Italia, ma appare evidente che queste strutture si mettono tra loro in antitesi precludendo a priori alcuni segmenti di mercato.

Etichettare ed incanalare a tutti i costi appartenenze, stili di vita, religioni, stili alimentari e quant'altro, forse, alla fin dei conti, anziché abbattere delle barriere culturali le evidenzia e le innalza.

Dovremmo probabilmente avere tutti un maggior senza di accettazione e di apertura a culture e stili di vita diversi dai nostri, ma che condividendoli nel rispetto reciproco potrebbero rendere tutti migliori.

Costruiamo insieme un Turismo dell'accoglienza indiscriminata

Fonti:
Corriereuniversitario.it; Kristi Pinderi – LGTB ProAlbania; Gay Star News; Xheni Karaj; Open Society Foundation; Linda Buckley – Vice President TIFFANY North America; Il Fatto Quotidiano; Franco Cuomo - ADNKRONOS; Vincenzo Chierchia - "Il Sole 24 Ore" ; Angelo D'Ambra – Historiaregni; Antonella Dartioni – AkiraZhong; Magda Antonioli e Marianna di Salle – BIT 02.04.17

ISBN: 978-2-931089-30-9

Scenari turistici dopo il Covid. La riscoperta del turismo lento

Giovanni TOCCI*
University of Calabria - Italy

Abstract: The Covid-19 pandemic in the early months of 2020 caused, in Italy, a great breakdown to tourism flows interrupting to the strong increasing trend of the previous decade. However, 2021 recorded the first signs of recovery, also confirmed by the 2022 season, thanks to the rediscovery of a "slow" and sustainable tourism, the tourism of small villages and green paths that triggered compensatory phenomena, although mainly consisting of from internal tourism flows.
In the last two years, under the pressure of the health emergency, Italian small cities and villages have been among the most demanded tourist destinations, far from the standard itineraries, as they are considered places where it is possible to enjoy opportunities and wider spaces and where combine the need for freedom with greater security.
In this framework, the paper deals with the slow tourism focusing on the small villages, the cities of good living and outdoor itineraries by the analysis of some typical practices of slow travel.

Keywords: Slow Tourism; sustainability; small villages; green paths.

1. Introduzione

L'emergenza sanitaria legata al Covid-19 ha determinato una brusca frenata, nel 2020, dei flussi turistici in tutto il territorio nazionale (Della Corte *et al*. 2021) rispetto al trend in forte crescita del decennio precedente. Il calo ha riguardato in particolare la componente internazionale che ha fatto segnare l'assenza dell'importante contributo che questo segmento rappresenta per il turismo italiano nel suo complesso (Demma 2021). Tuttavia, il 2021 ha registrato i primi segnali di ripresa, confermati anche dalla stagione 2022, grazie alla riscoperta di un turismo "lento" e sostenibile, quello dei piccoli borghi e dei cammini che ha innescato fenomeni in qualche misura compensativi, sebbene questi flussi siano costituiti per la maggior parte da spostamenti interni.

Secondo i dati forniti dall'Agenzia Nazionale del Turismo (ENIT), nell'anno in corso oltre la metà della popolazione italiana va in vacanza e tra questi il 20% sceglie di fare una vacanza outdoor (ENIT 2022a), a conferma anche di come la pandemia abbia accresciuto la propensione per le vacanze all'aperto e in località lontane dalle mete più affollate.

In particolare le ultime due stagioni, fortemente segnate dal Covid-19, hanno rilevato un trend in crescita degli arrivi e delle presenze in luoghi meno noti e meno battuti dai grandi flussi, ovvero in siti immersi nella natura in grado di garantire il "distanziamento sociale" con possibilità di coniugare bisogno di libertà con una maggiore sicurezza (cfr. Tocci 2021).

* Corresponding Author: giovanni.tocci@unical.it

In uno scenario in cui riacquista valore la dimensione dello spazio, i turisti riscoprono luoghi, fino a poco tempo fa, dimenticati e trascurati, e crescono le esperienze di viaggio lento e più sostenibili.

2. Il turismo lento: esperienza e propensione

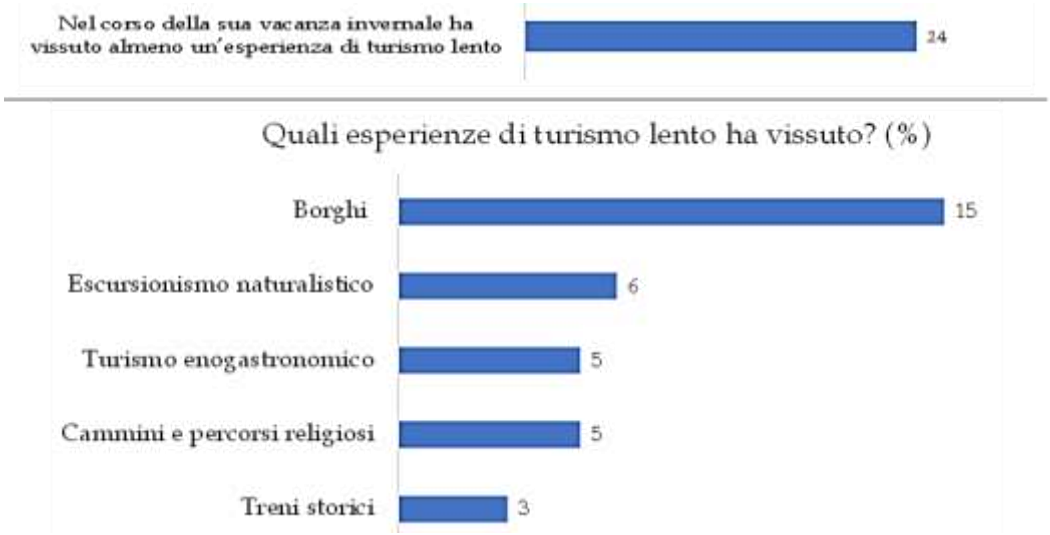
Negli ultimi decenni la domanda turistica sembra aver invertito direzione a favore di un turismo maggiormente orientato al sé, come espressione del riavvicinamento alle proprie radici e al proprio patrimonio, e alla ricerca di esperienze più dirette con la visione di un tempo svincolato dall'ansia e dallo stress tipici del vivere contemporaneo.

Lo Slow Tourism (Clancy 2018, 2014) è una filosofia di viaggio che incoraggia pratiche turistiche all'insegna della sostenibilità. Una forma di turismo che rispetta le culture locali, la storia e l'ambiente e valorizza la responsabilità sociale. Appare evidente come, da questa prospettiva, il turismo lento, concretizzandosi come un modo di vivere la vacanza, risulta essere un modello trasversale a tutte le tipologie di post-turismo declinabili a loro volta in chiave slow, come il turismo naturalistico, enogastronomico, dei borghi, dei cammini e il cicloturismo.

Queste nuove tendenze di viaggio hanno rivoluzionato il modo di concepire le vacanze. Lo slow tourism, che nasce in controtendenza ai ritmi accelerati della vita quotidiana, si basa sul piacere di vivere in maniera lenta e consapevole i luoghi, la cultura, le tradizioni e la natura. Un tipo di turismo che negli ultimi anni è cresciuto in maniera importante grazie anche alla capacità di intercettare necessità e richieste dei nuovi target di riferimento.

L'indagine sul turismo domestico[1], condotta dall'Agenzia Nazionale del Turismo, conferma una significativa crescita del turismo lento, rilevando un trend in linea anche con i livelli pre-pandemia. I dati dello studio riguardano le esperienze di turismo lento vissute dagli italiani nell'ultimo anno e la propensione per le vacanze estive, le previsioni di soggiorni outdoor per l'estate 2022 e i fattori determinanti per la scelta dell'esperienza stessa.

Figura 1. *Esperienza di turismo lento vissuta e tipologia dell'esperienza (%)*



Fonte: *ns. elaborazione su dati ENIT (2022b).*

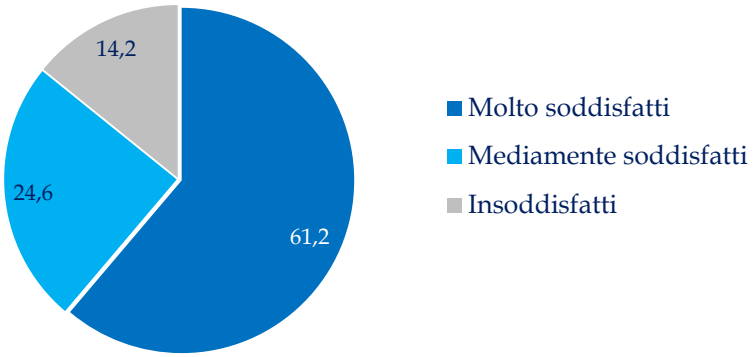
[1] La domanda turistica degli italiani. Previsionale estate 2022. Indagine sul turismo domestico (ENIT 2022b), è lo studio dell'Agenzia Nazionale del Turismo realizzato a giugno del 2022 attraverso la somministrazione di un questionario semi-strutturato ad un campione rappresentativo della popolazione italiana stratificato per età, genere, regione e grado di urbanizzazione. Sono state realizzate 3500 interviste a persone con più di 18 anni di età e il questionario è stato somministrato con metodologia CATI.

Dall'indagine è emerso che un quarto dei turisti italiani ha vissuto almeno un'esperienza di turismo lento (v. Fig. 1). L'esperienza ha riguardato la metà degli intervistati tra coloro che viaggiano in maniera frequente. Quasi uno su tre dei viaggiatori lenti appartiene alla generazione X e oltre un terzo ha un livello di istruzione elevato (ENIT 2022b).

Più in particolare rispetto all'esperienza di turismo vissuta, le vacanze presso i piccoli borghi hanno rappresentato la scelta più ricorrente, ovvero nel 15% dei casi, seguita dalle esperienze di turismo naturalistico ed escursionistico (6%), mentre i percorsi religiosi e i cammini storici e culturali, al pari delle esperienze di turismo enogastronomico, hanno rappresentato la scelta per il 5% dei viaggiatori lenti. Infine, il 3% ha vissuto un'esperienze di viaggio su un treno storico.

Rispetto all'impatto che l'esperienza vissuta ha avuto sul benessere psico-fisico (v. Fig. 2), l'indagine ha rilevato un livello di soddisfazione nel complesso molto alto, nello specifico oltre il 60% di coloro che hanno vissuto un'esperienza di turismo lento si ritengono molto soddisfatti, mentre quasi il 25% dichiara di esserlo mediamente e solo il 14% ha manifestato un livello di insoddisfazione.

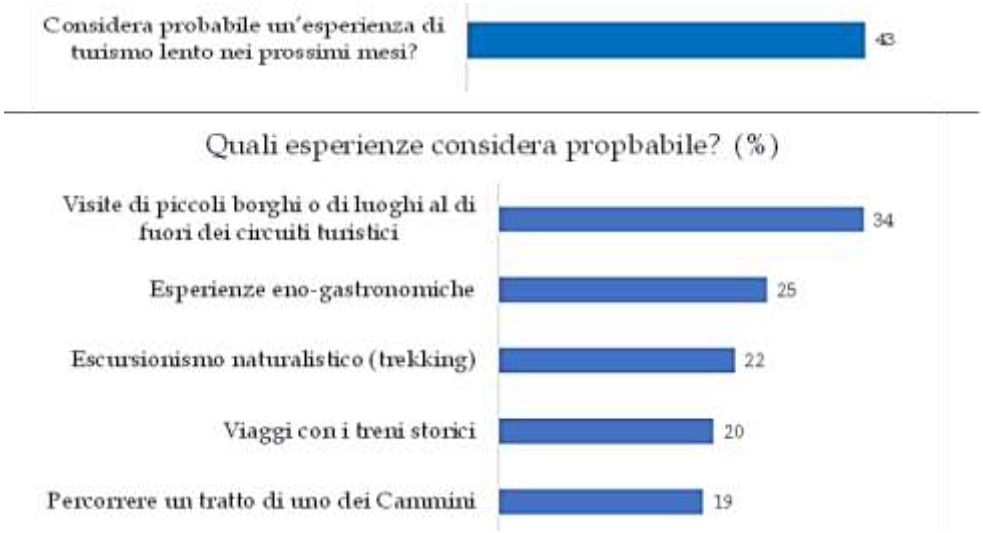
Figura 2. *Esperienza di turismo lento vissuta e impatto sul benessere psico-fisico (%)*



Fonte: *ns. elaborazione su dati ENIT (2022b).*

Relativamente alla propensione degli italiani a considerare una esperienza futura di turismo lento, dallo studio è emerso che circa quattro italiani su dieci sono interessati ad una esperienza del genere (v. Fig. 3). In particolare, oltre un terzo degli intervistati (34%) esprime interesse a trascorrere una vacanza in piccoli borghi o luoghi al di fuori dei circuiti turistici tradizionali.

Figura 3. *Propensione verso una esperienza di turismo lento e tipologia dell'esperienza*



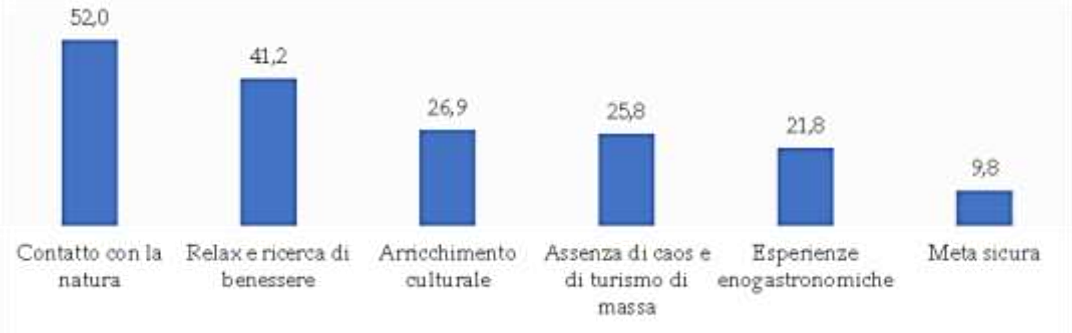
Fonte: *ns. elaborazione su dati ENIT (2022b).*

Un altro dato significativo è rappresentato da coloro che propendono verso esperienze enogastronomiche, ovvero il 25%, seguito dalle esperienze di turismo escursionistico, naturalistico e trekking che rappresentano la motivazione principale per il 22%.

L'esperienza di viaggio su un treno storico è ritenuta probabile da un intervistato su cinque e infine, il 19% dichiara di voler percorrere uno dei Cammini o tratti di itinerari storico naturalistici.

Rispetto ai fattori determinanti per la scelta di una esperienza di tipo lento, oltre il 50% dichiara di trovare nel contatto con la natura l'aspetto più interessante (v. Fig. 4). Il 41,2% trova, invece, la principale motivazione nella ricerca di relax e di benessere. L'arricchimento culturale rappresenta l'aspetto più importante per il 26,9% degli intervistati. Un valore molto simile (25,8%) è rappresentato dall'interesse per l'assenza di caos e di turismo di massa. Le esperienze enogastronomiche sono, invece, il fattore determinante per il 21,8% dei casi. Infine, la possibilità di godere di una vacanza in una destinazione sicura rappresenta il primo fattore per il 9,8% dei viaggiatori; un dato, quest'ultimo, che evidenzia la correlazione con il Covid e la paura di contagio, che vengono ancora percepiti evidentemente come rischio concreto.

Figura 4. *L'interesse verso esperienze future di turismo lento (%)*



Fonte: *ns. elaborazione su dati ENIT (2022b).*

Tali risultati, che evidenziano la crescita del turismo lento, sono, da un lato, la conseguenza delle nuove tendenze di una domanda turistica sempre più caratterizzata dalla ricerca di esperienze coinvolgenti, di conoscenza delle tradizioni e delle culture locali, dall'attenzione alla sostenibilità e al benessere. Dall'altro, soprattutto relativamente al panorama italiano, possono considerarsi il frutto del mutato quadro di rinnovamento dei modelli di offerta turistica, sempre più orientati alla sostenibilità e all'adattamento ai nuovi trend della domanda appunto.

3. La strategia nazionale per il turismo lento

Con il Piano Strategico del Turismo, approvato nel 2017 dal Governo italiano, ha preso avvio un programma che ha puntato alla valorizzazione di alcuni segmenti considerati i pilastri dell'offerta turistica italiana. Tra questi, il patrimonio enogastronomico dei piccoli centri e la realtà dei borghi italiani hanno assunto un ruolo centrale in una strategia volta all'implementazione e allo sviluppo di nuovi modelli di fruizione e gestione sostenibile in grado di favorire l'integrazione dell'ambiente e del paesaggio con le attività agricole, artigianali e turistico-culturali dell'intero paese (Mibact 2016).

Dentro questo quadro sono stati avviati progetti ed iniziative varie dai governi che si sono succeduti negli ultimi cinque anni e grazie ai quali i piccoli comuni e le destinazioni secondarie hanno registrato una significativa crescita in termini di arrivi e presenze turistiche.

La strategia ha preso avvio con il primo importante progetto, lanciato nel 2016 dall'allora Ministero dei Beni e delle Attività Culturali e del Turismo (Mibact), che ha riguardato la

realizzazione di un portale dedicato ai viaggi a passo lento: l'Atlante digitale dei Cammini d'Italia. In occasione della presentazione del progetto, il Mibact ha dichiarato il 2016 l'Anno dei Cammini.

L'atlante costituisce una vera e propria carta del turismo slow in Italia, con cui è stata mappata la rete di Cammini storici, naturalistici, culturali e religiosi presenti su tutto il territorio nazionale.

Nello stesso schema sono stati inseriti il 2017 come Anno nazionale dei Borghi, il 2018 Anno del Cibo Italiano, il 2019 Anno del Turismo Lento e il 2020 Anno del Treno turistico.

Questi progetti, con i relativi eventi e le iniziative collegati, hanno spaziato dalla creazione di una rete di vie verdi e di mobilità slow alla valorizzazione dei Borghi per lo sviluppo di un turismo esperienziale basato su tipicità e qualità del vivere e alla promozione delle tradizioni e della cultura enogastronomica italiana. Tali programmi sono stati pensati proprio in un'ottica di valorizzazione dei territori italiani meno conosciuti rispetto alle classiche destinazioni e di rilancio in chiave sostenibile favorendo esperienze di viaggio innovative, come i treni storici, le ciclovie, i cammini, le escursioni a cavallo, gli itinerari culturali e i percorsi enogastronomici.

Tutti i programmi e le azioni avviate fanno leva sullo stretto legame tra territorio e risorse locali, dunque riconoscendo un forte potere attrattivo a questo connubio che fa dei centri più piccoli, in particolare dei borghi, le nuove destinazioni.

Il turismo nei borghi è mosso dall'interesse dei visitatori verso la scoperta di luoghi diversi dalle tradizionali mete e caratterizzati soprattutto da specificità, prodotti tipici e sapori locali.

Le esperienze enogastronomiche, che dall'indagine ENIT (2022) figurano tra quelle di maggiore interesse per i turisti lenti (v. Fig. 3), trovano proprio nei borghi e nei piccoli centri i contesti ideali in quanto rappresentano i luoghi in cui si custodisce un patrimonio di antiche produzioni agroalimentari tramandate da generazioni.

Come conferma uno studio recente della Fondazione Symbola e Coldiretti sono proprio i centri più piccoli i luoghi di produzione della quasi totalità dei prodotti tipici che costituiscono la base del patrimonio enogastronomico italiano.

In particolare, lo studio svolto nel 2017 ha riguardato la mappatura di tutti i prodotti a Denominazione d'Origine Protetta (DOP) e di Indicazione Geografica Tipica (IGP) presenti in Italia a quella data, in relazione al comune di appartenenza.

In Italia i comuni con una popolazione pari o al di sotto dei 5.000 abitanti, classificati dall'Istat come "Piccoli comuni", al 2017 risultavano essere 5.567 per una quota pari al 69,8% di tutti i comuni italiani. I risultati evidenziano che, delle 293 tipicità mappate sul territorio nazionale, «solamente 23 riguardano esclusivamente medi e grandi comuni, mentre ben 270 coinvolgono esclusivamente (25) o parzialmente (245) piccoli comuni», ovvero il 92,2% di tutte le tipicità DOP e IGP (Fondazione Symbola-Coldiretti 2018, p. 12).

Nello specifico le tipicità censite si suddividono in 165 prodotti a marchio DOP e 128 IGP, di cui rispettivamente il 95,2% e l'88,3% (157 DOP e 113 IGP) interessano i territori dei centri più piccoli (v. Tab. 1).

Tabella 1. *Tipicità e Piccoli comuni italiani*

Classe	Comuni Italiani		Prodotti DOP		Prodotti IGP		Totale tipicità	
	N.	Val %	N.	Val %	N.	Val %	N.	Val %
Piccoli comuni	5.567	69,8	157	95,2	113	88,3	270	92,2
Altri comuni	2.410	30,2	8	4,8	15	11,7	23	7,8
Totale	**7.977**	**100,0**	**165**	**100,0**	**128**	**100,0**	**293**	**100,0**

Fonte: *ns elaborazione su dati Fondazione Symbola-Coldiretti (2018).*

Un tale quadro ha contribuito all'affermazione dei borghi quali mete turistiche sempre più richieste dai viaggiatori e i dati a disposizione confermano come le esperienze legate al turismo dei borghi si stiano affermando via via come nuova tendenza in fatto di viaggi.

In quest'ottica, ed in continuità con la pianificazione strategica 2017-2022, il Ministero della Cultura ha dato avvio al Piano Nazionale Borghi destinando un miliardo e seicento milioni di euro del PNRR proprio al miglioramento dell'attrattività dei borghi e alla valorizzazione del paesaggio rurale.

4. Considerazioni finali

La vacanza nei piccoli borghi, da sempre fortemente caratterizzati dalla presenza dell'agricoltura e da esperienze di turismo lento, rappresenta un esempio di turismo sostenibile prezioso per il sistema Paese che, se adeguatamente valorizzato, può diventare una risorsa strategica, oltre che sul piano economico e occupazionale, anche per il rilancio di un turismo sostenibile nel dopo Covid.

L'impegno dei vari governi e il lavoro sviluppato sul piano istituzionale hanno seguito, dunque, una strategia chiara che ha puntato alla creazione di un'offerta turistica integrata basata essenzialmente sullo sviluppo di infrastrutture, di esperienze e pratiche finalizzate alla promozione del turismo lento e sostenibile, pienamente in linea con gli obiettivi di rinnovamento e ampliamento dell'offerta turistica e valorizzazione di nuove mete fissati dal Piano Strategico del turismo 2017-2022.

Investire su un turismo lento e sostenibile può rappresentare non solo una strategia di sviluppo finalizzata alla tutela e alla riproposizione innovativa di luoghi, memorie, conoscenze e artigianalità, ma anche un metodo fondamentale per governare la costante crescita dei flussi attraverso la differenziazione di una offerta turistica in grado di rispondere ad una domanda in continua evoluzione e altrettanto diversificata.

Riferimenti bibliografici

Clancy M. (ed.) (2018). *Slow tourism, food and cities. Pace and the search for the "googd life"*. London: Routledge.

Clancy M. (2014). *Slow tourism: ethics, aesthetics and consumptive values*. In Weeden C., Boluk K. (eds). *Managing ethical consumption in tourism*. London: Routledge.

Demma C. (2021), Il settore turistico e la pandemia di covid-19. *Note Covid-19*, Banca D'Italia Eurosistema. URL: https://www.bancaditalia.it/pubblicazioni/note-covid-19/2021/Demma_Nota_Covid_settore_turistico_e_pandemia.pdf (Accesso: 10/10/2022).

Della Corte V., Doria C. and Oddo G. (2021), The impact of Covid-19 on international tourism flows to Italy: evidence from mobile phone data. *Questioni di Economia e Finanza (Occasional Papers), n. 647.* BANCA D'ITALIA-Eurosistema.

ENIT (2022a), *Estate 2022: 25 milioni gli italiani che vanno in vacanza, uno su cinque sceglie l'open air*. Comunicato stampa. Url: https://www.enit.it/it/estate-2022-25-milioni-gli-italiani-che-vanno-in-vacanza-uno-su-cinque-sceglie-lopen-air (Accesso: 25/10/2022).

ENIT (2022b), *La domanda turistica degli italiani. Indagine sul turismo domestico*. URL: https://www.enit.it/storage/202210/20221004134227_la%20domanda%20turistica%20degli%20italiani_%20previsionale%20estate%202022%20-%20indagine%20sul%20turismo%20domestico.pdf (Acc.: 02/11/2022)

Fondazione Symbola-Coldiretti (2018). *Piccoli Comuni e Tipicità*. Roma.

Mibact (2016), *PST 2017-2022. Italia Paese per Viaggiatori. Piano Strategico di Sviluppo del Turismo*, Ministero dei Beni e delle Attività Culturali e del Turismo, Roma.

Tocci G. (2021), *Borghi ed enogastronomia. Prospettive di sviluppo del turismo nel post Covid.* In Cekani I., d'Ovidio F. D., Favia F, Iaquinta P., (eds.). *5th UNICART International Conference "Food, Sustainability, Nutrition and Tourism"* - Proceedings Book. Embassy of Republic of Liberia in Rome/Lab Instruments s.r.l, Castellana Grotte, Bari (Italy), 23 - 25 November, pp. 281-288, Tirana-Bruxelles: IARC-ETQA Publishers.

ISBN: 978-2-931089-30-9

Percorsi di Turismo verde e sostenibile. L'esperienza dell'Ambito Territoriale "Terre di Siena"

Giovanni TOCCI*
University of Calabria - Italy

Abstract: Tourism is a phenomenon closely linked to environmental and territorial resources. If on the one hand, it requires natural resources, on the other, at the same time, it consumes them, consequently, a greater intensification of the phenomenon reduces the quality and availability of the same ones.
Starting from these considerations, awareness matures that even tourism can no longer ignore the conditions and principles that should guide its practices, and institutions increase their commitment to the implementation of strategies capable of fostering a transition to sustainable, responsible, and intelligent tourism. In this perspective, the paper focuses on tourism development strategies aimed at the protection, rediscovery and enhancement of places, memories and local knowledge.
Based on some concrete experiences, the study focuses on the action plans and practices implemented in these contexts. These cases express a change of vision and an approach aimed to promote "other" tourism and alternative paths which, in addition to encourage sustainable development, also gain relevance concerning to the experimentation of innovative practices and new governance models.

Keywords: Sustainable tourism; places; enhancement; paths; governance.

1. Introduzione

Il contributo si concentra sulle strategie di sviluppo turistico finalizzate alla tutela, alla riscoperta e alla valorizzazione di luoghi, memorie, conoscenze e saperi locali analizzando l'esperienza di alcuni contesti. In particolare lo studio ha esaminato l'esperienza dell'ambito territoriale Terre di Siena. Il lavoro si colloca dentro quello scenario che vede il tema della sostenibilità assumere un ruolo sempre più centrale rispetto alle dimensioni della vita e non da ultimo al fenomeno turistico.

Ad una domanda in continua evoluzione e sempre più attenta ai temi della sostenibilità e responsabilità ha fatto da contraltare, relativamente al panorama italiano soprattutto negli ultimi anni, una offerta più orientata alla promozione di esperienze green e di turismo lento.

Il turismo è, per definizione, un fenomeno strettamente legato alle risorse ambientali e territoriali. Se da un lato, esso necessita di risorse naturali, dall'altro, contestualmente, le consuma e più il fenomeno si intensifica, più la qualità e la disponibilità delle risorse stesse diminuiscono.

Considerato che i beni naturali non sono infiniti e perlopiù difficilmente riproducibili (Pieroni, 2002, 2008), in assenza di limitazioni, vincoli e principi guida, il turismo sarebbe un fenomeno che tenderebbe all'autodistruzione.

* Corresponding Author: giovanni.tocci@unical.it

Le evidenze circa gli aspetti negativi prodotti dall'intensificazione del fenomeno turistico su ambienti, culture, società, economie nei paesi di destinazione, accanto alle eredità lasciate della società industriale e dal turismo fordista o di massa (De Masi 2018; Savelli 1998), hanno condotto alla consapevolezza che lo sviluppo del turismo non possa più prescindere da condizioni e principi specifici entro i quali le pratiche turistiche debbano attuarsi.

2. Strategie di transizione al turismo sostenibile

I cambiamenti sul piano quantitativo e qualitativo che hanno caratterizzato il turismo e la sua evoluzione storica, in parallelo alle profonde trasformazioni anche sul piano economico e sociale, hanno progressivamente aperto nuovi scenari e nuove categorie di valori (Carta di Lanzarote 1995; UNWTO 2015).

A partire dall'ultimo trentennio del secolo scorso si affermano così approcci che si sono avvicinati sempre più ai temi della sostenibilità e responsabilità, anche in materia turistica, soprattutto rispetto alle forme di turismo di massa e di lusso, in cui le attività turistiche, in forte crescita e sempre più sganciate dalle appartenenze di classe (Marra 2010), sono espressione di un turismo in cui prevalgono pratiche orientate alla sostenibilità, al rispetto per la storia, i luoghi, le culture locali e le tradizioni (De Masi 2018).

Il problema, tuttavia, va oltre la mera questione ambientale, nel senso che la tutela deve essere estesa anche alle risorse immateriali dei contesti turistici, prestando attenzione anche alle culture, alle tradizioni e alla storia dei luoghi, che troppo spesso, invece, vengono sottoposte a forme di sfruttamento o mercificazione.

In questo scenario il dibattito sul turismo, e le sue conseguenze, guarda sempre più alle pratiche turistiche incentrate sulla valorizzazione dei contesti e delle culture locali e cresce la spinta delle istituzioni verso strategie in grado di favorire una transizione ad un turismo sostenibile, responsabile e intelligente (Parlamento Europeo 2021)[1].

E così oggi temi centrali diventano le pratiche "slow", il turismo "verde", la mobilità "dolce". Si tratta di strategie che puntano sempre più all'utilizzo e al recupero dell'esistente; aspetti che sono diventati presupposti essenziali, oltre che per la sostenibilità, anche per l'attrattività dei luoghi, poiché finalizzati alla riqualificazione delle risorse naturali, al recupero dei paesaggi e alla rivitalizzazione di piccoli borghi, e quindi alla promozione di uno sviluppo sostenibile dei territori e in particolare del turismo.

Le forme di turismo legato alla natura, la ricerca di esperienze coinvolgenti e di un contatto diretto con l'ambiente, i luoghi e le comunità delle mete di viaggio, figurano come pratiche in grande crescita negli ultimi anni, soprattutto in Italia, anche in conseguenza dell'emergenza sanitaria da covid-19 che «ha determinato un mutamento nella natura delle esigenze dei viaggiatori a favore di un turismo sicuro, pulito e più sostenibile» (*Ibidem*)[2].

[1] La Risoluzione del Parlamento Europeo del 25 marzo 2021 sulla definizione di una strategia dell'UE per il turismo sostenibile osserva come esso «dovrebbe tenere conto degli effetti economici, sociali e ambientali attuali e futuri, […]; pone in evidenza la necessità di trovare soluzioni sostenibili e flessibili per i trasporti multimodali e di elaborare politiche a tutela del patrimonio naturale e della biodiversità, rispettando l'autenticità socioculturale delle comunità di accoglienza. […] Sollecita gli Stati membri a elaborare piani d'azione sostenibili sul turismo a livello nazionale e regionale […] nonché a sfruttare appieno i fondi di *Next Generation EU* per finanziare i piani d'azione per la transizione nel settore del turismo» (Parlamento Europeo 2021).

[2] In risposta a questo mutato quadro della domanda, il Parlamento Europeo, nella stessa risoluzione, sottolinea ancora «che le attività artigianali locali, l'agriturismo, il turismo rurale e l'ecoturismo sono una parte integrante del turismo sostenibile, in quanto promuovono la scoperta dei nostri territori, della natura e dei paesaggi su itinerari percorribili a piedi, in bicicletta o a cavallo, l'accesso ai quali deve essere condiviso» (*Ibidem*).

3. L'offerta turistica del portale Terre di Siena

Nell'ambito del programma nazionale di valorizzazione turistica, il Piano Strategico di Sviluppo del Turismo 2017-2022 (PST 2017-2022), «richiede di rafforzare la tipizzazione delle offerte territoriali attraverso il riconoscimento delle autenticità» in un'ottica di potenziamento dell'offerta attraverso l'integrazione delle «differenti esperienze turistiche, sia incoraggiando soluzioni organizzative e di governance più efficienti, sia favorendo le relazioni e le connessioni tra comparti diversi (enogastronomia, agricoltura, cultura, etc.)» (Mibact 2016, p. 57).

Il lavoro prende in considerazione un caso specifico, relativo all'offerta turistica del portale Terre di Siena, che si inserisce proprio dentro questa cornice. Il portale web dell'Ambito Turistico Territoriale[3] che abbraccia il comune della città di Siena e altri otto comuni della provincia senese.

"Questo portale – in linea con la strategia *#tuscanytogether* avviata da Toscana Promozione Turistica[4] – offre informazioni e notizie che riguardano il territorio su contenuti necessari ad accogliere ed informare l'ospite che raggiunge la destinazione turistica.

I prodotti turistici del territorio sono categorizzati secondo temi specifici quali: arte e cultura, cammini e outdoor, enogastronomia, luoghi della fede, benessere, wedding e *MICE* (Meeting, Incentives, Congress, Exhibition), infine è presente una sezione apposita dedicata agli eventi.

Figura 1. *Home page del portale Terre di Siena*

Fonte: *https://www.terredisiena.it/ (Accesso: 04/11/2022)*

Il portale turistico dell'Ambito Territoriale Terre di Siena è un esempio completo di offerta turistica varia che propone diverse esperienze di turismo sostenibile. Le scelte strategiche sono

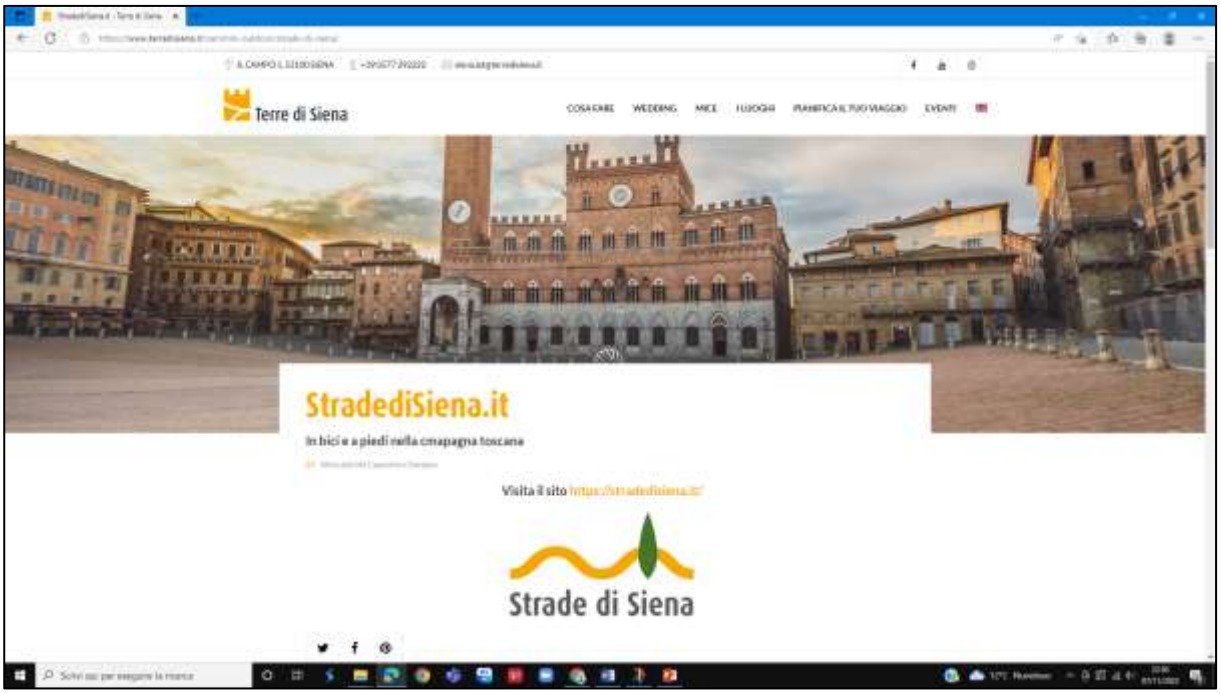
[3] La Regione Toscana con la L.R. 24/2018 ha integrato il Testo Unico in materia di turismo, con la definizione degli Ambiti territoriali omogenei, come strumento ottimale di organizzazione turistica (Legge Regionale n. 24 del 18 maggio 2018: *Disposizioni in materia di sistema organizzativo del turismo, strutture ricettive, locazioni e professioni turistiche*. Modifiche alla L.R. 86/2016. Bollettino Ufficiale n. 19, parte prima, del 25 maggio 2018).
[4] *#tuscanytogether* è il sito dell'Agenzia Regionale "Toscana Promozione Turistica". L'agenzia, istituita con la L.R. n. 22 del 2016, ha il compito di affiancare i territori nella costruzione e la promozione delle destinazioni e dei prodotti turistici territoriali che compongono l'offerta regionale.

state infatti definite secondo i principi della sostenibilità socio-economica e ambientale attraverso la valorizzazione di luoghi meno conosciuti e l'esaltazione delle tipicità territoriali in termini di cultura, tradizioni e biodiversità. Pertanto si presenta come un caso concreto di un'offerta turistica slow e green che integra il ricco patrimonio culturale, storico, artistico con il paesaggio, le specificità del territorio e l'enogastronomia.

3.1 Percorsi green e mobilità dolce

In linea con uno degli obiettivi specifici[5] del PST 2017-2022, l'Ambito Territoriale Terre di Siena ha messo a sistema, proprio attraverso il suo portale, una rete di percorsi "slow" a fini turistici. Una intera sezione del portale Terre di Siena è dedicata alle vie verdi e alla mobilità dolce (v. Fig. 2). Le proposte contenute nella sezione "Strade di Siena" vanno dai Cammini, agli itinerari in bici, dalle ippovie al treno turistico.

Figura 2. *Strade di Siena: la rete della mobilità dolce*



Fonte: *https://www.terredisiena.it/ (Accesso: 04/11/2022).*

In particolare "Strade di Siena" contiene un'ampia scelta tra itinerari e percorsi che consentono la pianificazione di una vacanza a "ritmo lento" in cui, il viaggiatore ha la possibilità di apprezzare le bellezze naturalistiche del territorio, visitare borghi medievali e ammirare paesaggi, percorrendo sentieri storici, attraversati sin dall'antichità da milioni di pellegrini.

Tra i Cammini, il più conosciuto è senza dubbio la Via Francigena[6], l'itinerario che collegava Canterbury a Roma. Il lungo tratto senese della via Francigena attraversa il territorio della provincia da nord fino all'ingresso nel Lazio. Un tratto di oltre 100 km che può essere percorso non solo a piedi, ma anche in bicicletta o a cavallo.

[5] L'obiettivo specifico B.2 "Adeguare la rete infrastrutturale per migliorare l'accessibilità e l'intermodalità" del PST 2017-2022 riguarda propriamente «il tema della "mobilità dolce" e [la] progettazione strategica per lo sviluppo nel Paese di una rete infrastrutturale "slow", che [include] ciclovie, cammini, valorizzazione di percorsi ferroviari storici, integrazione tra servizi ferroviari e promozione turistica» (Mibact 2016, p. 75).

[6] La Via Francigena nel medioevo era una delle principali vie di comunicazione, un "cammino", inteso non solo come strada ma, soprattutto, come percorso spirituale e di conoscenza, opportunità di scambi culturali oltre che commerciali, occasione di incontri e di riflessione (https://www.terredisiena.it/cammini-outdoor/).

Vi è poi la Via Lauretana[7] con il tratto tra Siena e Asciano nelle splendide Crete Senesi e infine la Via Romea il collegamento tra Siena e Firenze, crocevia delle vie storiche della Toscana (https://www.terredisiena.it/cammini-outdoor/).

Ai due grandi cammini, Via Francigena e Lauretana, si affiancano altri itinerari minori come la Via delle Grance, La Montagna, il Sentiero della bonifica, la Transumanza, il Trekking urbano. Ciascuno di questi itinerari si articola in diversi percorsi che si intersecano tra essi oltre che con i principali Cammini.

Gran parte degli itinerari percorribili a piedi, inclusi la Via Francigena e la Via Lauretana, sono anche ciclabili e percorribili naturalmente a cavallo.

Le ciclovie presenti sul portale sono in totale 26 e sono costituite da percorsi interamente segnalati, tra questi i più importanti sono l'*Eroica* che si estende per oltre 200 km, il *Canale maestro della Chiana* che copre un tragitto di 62 km e il *Grand Tour della Val di Merse* lungo 147 km.

I sentieri da fare a cavallo costituiscono veri e propri percorsi immersi nella natura di uno dei paesaggi più belli della Toscana. Val d'Orcia, Chianti, Crete Senesi e tutti gli altri territori della provincia di Siena si rivelano luoghi da esplorare a cavallo sui sentieri dedicati. Lungo le ippovie sono collocati diversi punti sosta e agriturismi dove è possibile integrare il viaggio con degustazioni enogastronomiche a base di prodotti tipici.

La rete della mobilità slow presente sul portale è completata infine dal Treno Natura, il treno turistico che ripercorre il tracciato della ferrovia storica della Val D'Orcia.

La *Ferrovia della Val D'Orcia* è una delle dodici tratte di ferrovie dismesse e riportate in funzione nell'ambito del progetto Binari Senza Tempo, avviato nel 2013 da Fondazione FS Italiane e finalizzato al recupero di linee ferroviarie dismesse da destinare al traffico di treni storico-turistici (Fondazione FS Italiane 2019).

La Ferrovia della Val d'Orcia, lunga oltre 50 chilometri, fu aperta nel 1872 per il collegamento tra Siena e Grosseto. Sospesa nel 1994, è stata riattivata nel 2014 con finalità turistiche.

La tratta ripercorre il paesaggio della Val d'Orcia e delle Crete senesi, attraversando zone ad elevato interesse turistico come Montalcino e il Monte Amiata. Il territorio è conosciuto, in particolare, per le diverse fonti termali e per le pregiate coltivazioni di uva con cui si produce il noto vino rosso "Brunello".

Naturalmente ogni esperienza, che si tratti di itinerari a piedi, a cavallo, in bici o in treno offrono la possibilità di godere, oltre che del paesaggio e delle bellezze naturalistiche, anche delle tipicità del luogo, con particolare riferimento ai prodotti dell'enogastronomia.

Il progetto del Treno Natura si sviluppa proprio secondo un approccio che punta ad integrare tutte le risorse del territorio legando paesaggi, storia e tipicità.

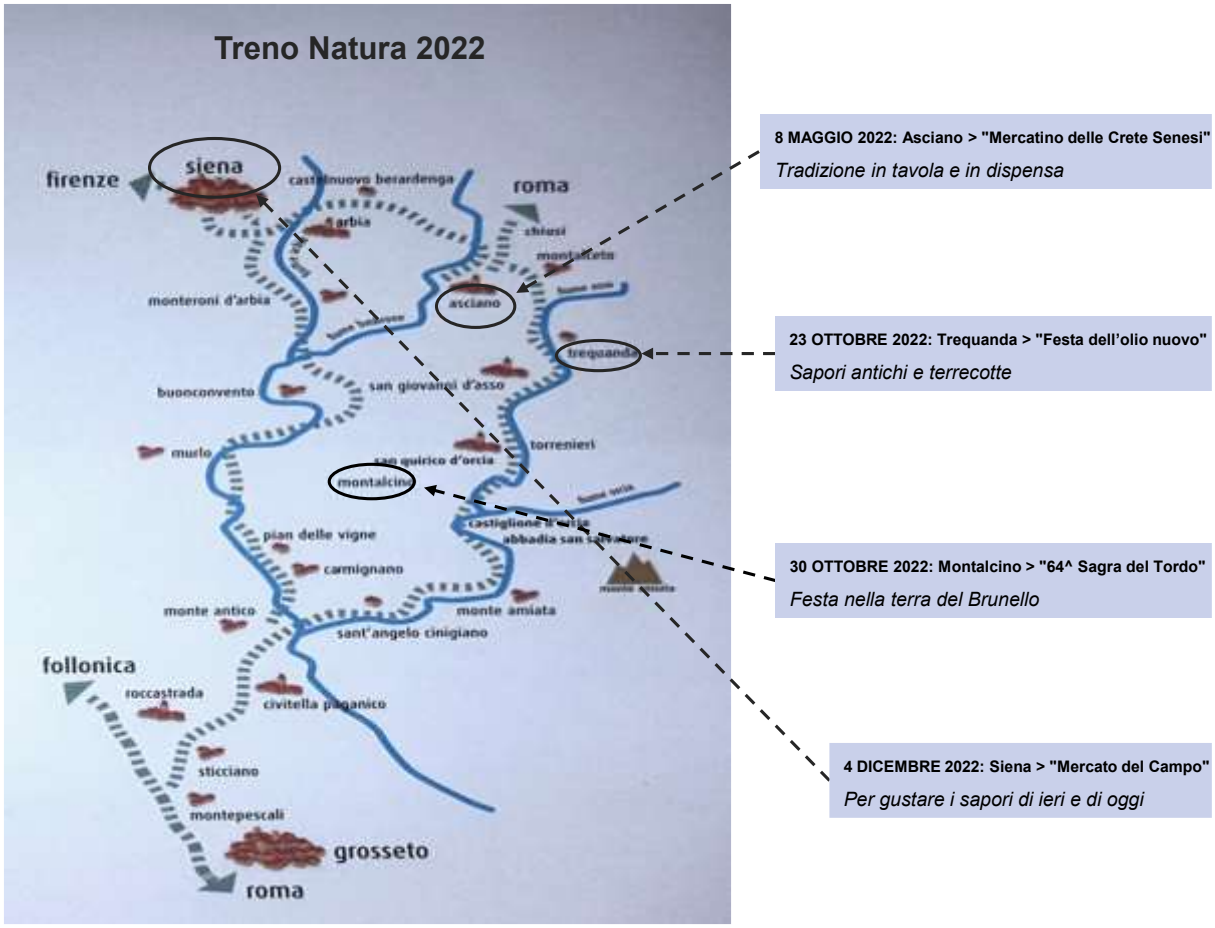
Il Treno Natura, un treno d'epoca con locomotiva a vapore, attraverso itinerari inconsueti offre la possibilità di ammirare paesaggi incontaminati che racchiudono un ricco patrimonio di tradizioni, arte, cultura ed enogastronomia.

Il Treno è sempre abbinato ad un evento speciale (v. Fig. 3), come sagre e feste di paese, con possibilità di escursioni in pullman per raggiungere le località interessate dall'evento, quindi per partecipare a sagre e feste, o per visitare borghi e castelli, o soffermarsi per una degustazione in una fattoria.

[7] «La via Lauretana senese è un'antica strada ed è parte di un fascio viario ovest-est nel cuore della Toscana, che collega Siena con la Val di Chiana attraversando Asciano. Essa è il risultato del collegamento di un reticolo di strade esistenti già in epoca etrusco-romana, poi sviluppatesi nel medioevo con nuove varianti, che furono infine consolidate nel Settecento dalla lungimirante opera di rinnovamento granducale, tesa a migliorare il sistema viario della Toscana» (Fonte: *Wikipedia* - https://it.wikipedia.org/wiki/Lauretana_senese).

 ISBN: 978-2-931089-30-9

Figura 3. *Il Treno Natura*



Fonte: *ns elaborazione.*

Nella sezione Strade di Siena sono contenute tutte le informazioni relative alla rete di mobilità dolce dell'intero Ambito Territoriale, nella quale i Cammini e i Percorsi slow sono stati definiti concretamente come prodotto turistico. Un'ampia proposta di itinerari che va dalla semplice escursione al vero e proprio viaggio.

Inoltre, lo stesso progetto del Treno Natura si colloca pienamente in linea, ancora una volta, con le azioni del PST volte a promuovere, accanto alle ciclovie e ai cammini, anche i servizi ferroviari turistici e le ferrovie storiche.

L'intera proposta di esperienze contenute neul portale è l'espressione di una chiara strategia che l'ambito territoriale ha condotto nel corso degli ultimi anni, finalizzata alla differenziazione dell'offerta e alla valorizzazione delle località secondarie rispetto ai circuiti classici.

4. Considerazioni finali

Considerato che il turismo è un fenomeno in crescita e destinato ad aumentare ulteriormente, il problema del suo impatto sulle destinazioni, soprattutto sulle mete più ricercate, rimane un tema aperto e molto dibattuto.

Le soluzioni al problema molto spesso hanno seguito percorsi diversi da contesti a contesti. In alcuni casi ad esempio le risposte al problema si sono tradotte in azioni di contenimento e limitazione del fenomeno.

Per cui diventa fondamentale approcciarsi al problema ragionando di più sulla centralità del turista e sulla diversificazione dell'offerta attraverso la promozione e la valorizzazione di forme

di turismo sostenibile, anche nell'ottica di promuovere mete alternative ed alleggerire quelle più colpite da fenomeni di sovraccarico.

Il portale Terre di Siena è l'espressione concreta di un cambio di visione in linea con un approccio finalizzato alla promozione di forme alternative e di "altri" turismi che, oltre a favorire uno sviluppo sostenibile, assumono rilevanza anche rispetto alla sperimentazione di modelli innovativi per governare la costante crescita dei flussi in particolari contesti, e di governance del fenomeno turistico in generale.

Riferimenti bibliografici

Carta di Lanzarote (1995), *Carta Per Un Turismo Sostenibile*, Lanzarote, 27/28 aprile.

De Masi, D. (2018), *L'età dell'erranza. Il turismo del prossimo decennio*. Marsilio Editore, Venezia.

Fondazione FS Italiane (2019), *Atlante delle linee ferroviarie turistiche*, Ferrovie dello Stato Italiane, Roma.

Marra, E. (2010), *Introduzione. Verso 'altri' turismi*. In Marra, E. e Ruspini, E. (a cura di), *Altri turismi. Viaggi, esperienze, emozioni*. FrancoAngeli, Milano: 9-19.

Mibact (2016), *PST 2017-2022. Italia Paese per Viaggiatori. Piano Strategico di Sviluppo del Turismo*, Ministero dei Beni e delle Attività Culturali e del Turismo, Roma. URL: https://www.ministeroturismo.gov.it/il-piano-strategico-del-turismo/ (Accesso: 09/11/2022).

Parlamento Europeo (2021), *Strategia dell'UE per il turismo sostenibile. Risoluzione del Parlamento europeo del 25 marzo 2021.* Bruxelles. URL: https://www.europarl.europa.eu/doceo/document/A-9-2021-0033_IT.html (Accesso: 12/10/2022).

Pieroni O. (2002). *Fuoco, acqua, terra e aria. Lineamenti di una sociologia dell'ambiente*. Carocci, Roma.

Pieroni O. (2008). *Paesaggi, ecomostri ed intervento politico-amministrativo. Un'indagine sul degrado e l'abusivismo lungo le coste calabresi*. In AA.VV., *Tracce di Turismo sostenibile*. Centro Editoriale e Librario, Università della Calabria: 73-101.

Savelli, A. (1998), *Sociologia del turismo*. FrancoAngeli, Milano.

UNWTO (2015). *Assemblea Generale delle Nazioni Unite del 7 dicembre 2015*. Madrid.

ISBN: 978-2-931089-30-9

Thoughts and reflections on youth tourism

Elisa GALLO
University of Calabria - Italy

Antonella PERRI*
University of Calabria - Italy

Tullio ROMITA
University of Calabria - Italy

Abstract: A large segment of tourists in the world is characterised by young people, the so-called millennials or digital natives, who differ from other types of tourists for the development of various travel needs and motivations: younger generations are constantly searching for a hol-iday that is marked by authenticity, a true customised experience, built according to their needs and interests. They act as an innovative element within society, creating, sometimes, trends in behaviour that can determine the appearance of new tourism approaches. Young tourists are also characterised by a greater availability of free time and a propensity to travel following a kind of tourism demand that appears to be seasonally adjusted..

Keywords: Social issues, youth tourism, heterotopia

1. Introduction

Tourism is an ever-changing social phenomenon, it changes and transforms, as it must measure itself against the changes in the world we live in and with the consequences they bring to the society. In the same way, tourists also change, as do their demand, their needs and their motivations for travelling. Let us just think that before the pandemic emergency, choices in the field of tourist destinations were based on asking what to do or see; today, on the other hand, the new trend is to ask why to travel or what motivates a certain individual to make a trip.

A large segment of tourists in the world is characterised by young people, the so-called millennials or digital natives, who differ from other types of tourists for the development of various travel needs and motivations: younger generations are constantly searching for a holiday that is marked by authenticity, a true customised experience, built according to their needs and interests. They act as an innovative element within society, creating, sometimes, trends in behaviour that can determine the appearance of new tourism approaches.

Young tourists are also characterised by a greater availability of free time and a propensity to travel following a kind of tourism demand that appears to be seasonally adjusted.

The aim of this text is to highlight how young tourists are more focused on slower and more authentic types of tourism, and to show a case study that collects important data on the motivations of young tourists who choose to stay in private homes for holidays.

* Corresponding Author: antonellaperri@unical.it. Centro Ricerche e Studi sul Turismo (CReST) of the University of Calabria. The work is the result of the common reflection of all the authors, however paragraphs 1 and 2 were mainly edited by Elisa Gallo, paragraphs 3 and 4.3 by Antonella Perri, paragraphs 4.1, 4.2 and 5 by Tullio Romita.

2. Youth tourism

Over the last few years, the importance of youth tourism has been affirmed and has assumed a quite significant role within the tourism sector, becoming a subject of study and research, both qualitatively and quantitatively. Moreover, the study of this type of tourism appears also important from an economic point of view, due to the impact it can generate on local economies and the potential of the market segment it represents.

The first academic contributions date back to the late 1960s, when the OITS (Organisation Internationale du Tourisme Social) approved the youth tourism manifesto, which was updated in 1981 to promote this type of tourism as part of social tourism.

Through the years, youth tourism has gained more space, especially in terms of qualitative analysis: for instance, the ETC (European Travel Commission) report of 1995, estimated that youth tourism constituted 23% of the international tourism market, a value that continues to grow (Moisă, 2010a). According to the UNWTO, indeed, youth tourism is one of the fastest growing and evolving segments in the world tourism market.

Nevertheless, it is difficult to find a unified definition of the tourist typology in question; the difficulty lies principally in identifying an age group that is able to represent the youth segment. For example, the UN defines youth as being between the ages of 15 and 24, the WTO considers individuals between the ages of 15 and 25, while other studies consider age groups ranging from 16 to 29 or 16 to 35.

This difficulty underlines the fact that, in order to best represent the category of young people, it is not enough to focus only on the age, but other central factors must also be considered: for instance, living habits, social structure, possibilities of entering the world of work, leaving the original family unit and so on (Moisă, 2010b). Thus, the concept of youth assumes and strengthens its meaning when it is placed in relation to the historical, social and cultural context within which it is used.

Among the various definitions available in the literature, that which we will consider here is the one proposed by the WYSETC (World Youth Student & Educational Travel Confederation), which appears to be in line with the definition of tourism provided by the UNWTO, according to which youth tourism includes "all those international and independent travels of less than one year by people aged 15 to 29 motivated, partly or fully, by a desire to experience other cultures (including cultural exchange visits), build life experiences or benefit from formal and informal learning opportunities outside their usual environment." (United Nations World Tourism Organization & WYSETC, 2008)

By 'independent travel', WYSETC refers to the travel of young people who are not accompanied by parents or legal guardians.

In addition to quantitative studies, a series of research on young people's tourism behaviour have followed: in particular, we mention the contribution of Carr (2002), who provides interesting insights into young people's favourite destinations and their travel motivations, and Moisă (2010), who analyses the definitions of youth tourism and the factors influencing it.

An important contribution useful to expand the knowledge of this phenomenon is represented by the surveys carried out by WYSETC, for the first time in 2002, and repeated in 2007. One of the most important data resulting from this research is that more than 80% of the young people interviewed state that their main motivation for travelling is the desire to explore and get to know new cultures, with the aim of increasing their knowledge and improving their lifestyle (United Nations World Tourism Organisation & WYSETC, 2008).

The studies mentioned so far can be complemented by the contributions of official statistics, such as the sample survey "Viaggi e Vacanze degli italiani" (Italians' Travel and Holidays) conducted by ISTAT or the survey on the movement of customers in accommodation establish-

ments, which provide information on tourism demand and make it possible to quantify the arrivals and presences of customers in accommodation establishments.

However, the literature on the subject is fragmented and not very organic, as is the support of official statistics since they do not allow us to obtain information on the behaviour of the youth tourism segment.

3. Young digital natives and tourism

What is clear, however, is that young tourists are hungry for experience: they are driven by a desire to explore new cultures to increase their knowledge and to experience new and different ways of life. Youth tourism is therefore a dynamic and continuously expanding phenomenon.

A crucial role in attracting young people to new forms of tourism is played by social networks. We are constantly connected to the Internet and from time to time we change our minds about what to do, guided by those tools that have become an integral part of our lives (Perri, Romita, 2020).

Digital natives, indeed, using so much social media and observing global reality through them, tend to show a more open attitude towards new experiences and towards confrontation with other cultures. Moreover, they constantly share the places they visit with their followers, and the more interesting and unfamiliar these places appear, the more they can generate interest.

At this stage, social networks represent the contemporary form of word of mouth, that is the social process in which, through narratives and images, information is exchanged and identifications are made (Perri, Romita, 2020).

In addition, young people apparently pay more attention to sustainable, green and low environmental impact travel options, to destinations far from mass tourism, which are more niche and less known, and are thirsty for discovery and rediscovery, as well as a sense of belonging to the places of their origins or those of their descendants.

Among the various trends that are gaining ground among the younger generations, there is certainly a desire to trace and rediscover one's genealogical lineage, to travel in search of one's roots: instead of choosing mass tourism destinations, young people choose, for example, to visit the village where one of their ancestors was born, or to explore the places where their family members were born and raised. The birthplaces of their parents, grandparents or great-grandparents become an important stage to visit for many young Italians born abroad and not, who, driven by the wish to know and discover, visit places far from the famous destinations but which still offer emotionally rich experiences linked to their personal and family history.

4. The behaviour of young tourists in the case of private home tourism in Calabria

4.1 Foreword

Following this, we will discuss the results of a field survey addressed to a sample of tourists who spent a holiday period in Calabria staying in a private home for holidays. More specifically, we will illustrate some results that concerned the behaviour of young tourists.[1]

In fact, this is, in general, one of the few surveys carried out on this type of tourists. In these cases, the main problem is that there is a general lack of information concerning the complete understanding of the dimensions of the demand for tourism of private homes, so in the case of surveys, the sample of tourists interviewed can almost never be considered effectively representative of the reference universe.

[1] The research materials are available at the CReST (Center for Research and Studies on Tourism) of the University of Calabria.

However, in conducting the research, and taking into account the preliminary interviews we had with various local stakeholders (municipal administrations, real estate brokers, subjects operating in the supply of basic tourist services, etc.), we first of all restricted the field of investigation to those territories where the phenomenon would seem to be most present; furthermore, we decided on a high number of interviews (over 1600), specifically in order to make the results of the research highly reliable, even if they are of a pilot nature.

The on-site survey was carried out in the period from June to October 2014, by a staff of expert interviewers who were joined by interviewers trained in individual research locations. Therefore, a questionnaire was administered to people on holiday in Calabria, organised into themes that made it possible to explore different dimensions of the holiday: behaviour, motivations, choices, costs, etc.

It should be noted that these interviews were conducted with tourists for whom a holiday in a private home is not an alternative to a stay in hotel or non-hotel accommodation, but a real choice.

4.2 The target population

63.4% of the tourists interviewed stay in a private holiday home of which they are not owners, while the remaining 36.6% stay in private holiday homes of which they are owners (cf. tab. 1). Regarding the identikit of the interviewed tourist population, in 55% of the cases we have male respondents, aged between 18 and 89 years. In general, about half of the people interviewed are aged between 18 and 40, the youngest are the most numerous (up to 30 years of age over 31%), while over 11% are tourists older than 60.

Tab.1 - *Sport and wellness activities performed by tourists by age group**

Sports and wellness activities	up to 29 years	30 to 65 years	over 65 years
Private boat tours	19,3	8,9	7,5
Rental boat tours	5,3	2,6	0,9
Skiing activities	0,4	0,6	
Horse riding	3,8	5,4	0,9
Trekking	6,2	5,8	4,7
Tennis	7,3	8,3	0,9
Mountain bike, cycling	12,4	6,7	0,9
Football/soccer	24,2	9,3	0,9
Walks	55,9	45,7	62,6
Swimming	39,7	22,4	22,4
Surf/Windsurf	5,1	2,0	
Sailing	6,4	2,4	0,9
Diving/snorkelling	8,4	3,8	
Golf	0,9	1,4	
Frequenting wellness centres	4,9	5,9	1,9

Source: CReST – Unical: Tourism Survey in Calabria 2014
*: *Respondents who answered "YES" by age group*

Subjects with a diploma are prevalent (55.5%), as well as married subjects (56.1%) and subjects who within the family unit occupy the position of 'head of household' (36.7%) and 'son/daughter' (33.0%) followed by the spouse condition (25.4%).

With regard to socio-economic status, some interesting information concerns the occupational and professional dimension: 41.4 per cent of the respondents stated that they had a stable and permanent job, while unemployment status affects 8% of them (with a marked presence of employees).

Foreign respondents appear to be present at 5.3%, while 32.0% of respondents are from Calabria itself, followed by an interesting number of respondents living in regions surrounding Calabria.

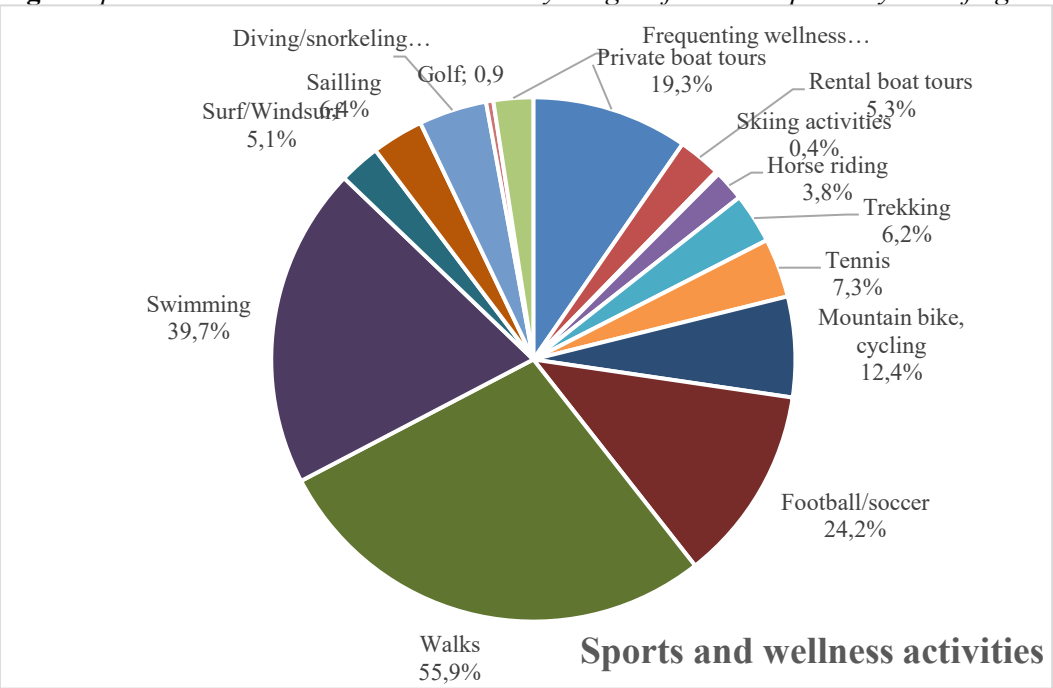
The duration of stay of tourists in private homes is on average longer than that of tourists in official accommodation: 70.8% of the interviewed tourists who do not own their homes stay 2 to 4 weeks, while 75. 8% of the tourists who own their homes stay 3 to 8 weeks.

The most used means of transport to reach the holiday location chosen by the tourists interviewed is their car or that of their family. Staying in company with their family clearly prevails, closely followed by staying in company with their spouse or partner; most of the interviewees are habitual holidaymakers at the location of the private home where they are spending their holidays, with over 60% stating that they often or very often go there, while the percentage of tourists interviewed who would recommend a friend and/or relative to spend a holiday at the location where they themselves are on holiday is significantly higher (63.6%) than those who would not recommend it.

4.3 The behaviour of young tourists

As is well known in the literature, the tourist behaviour of people on holiday is highly variable with respect to the age group they belong to. This consideration seems quite obvious if one thinks of the activities practicable on holiday that require more energy and a more carefree state of mind, while it is less obvious with respect to activities that concern cultural interests and the knowledge of the territory and specific cultural contents connected to the host community. In any case, it is interesting to show below some of the results of the research in question, not only to add more data on the tourist behaviour of young people on holiday, but also because this research looked at the behaviour of a particular type of tourist, which is very widespread but also under-explored, namely the private home tourist (second home tourism).

Fig.1 - *Sports and wellness activities: summary weight of tourists up to 29 years of age*



Source: CReST – Unical: Tourism Survey in Calabria 2014

The results we highlight are those illustrated in the following tables and figures, grouped into four thematic groups: sports and wellness activities, events participation, excursions in the holiday region and visits to available resources, shopping activities. Tables offer a comparative

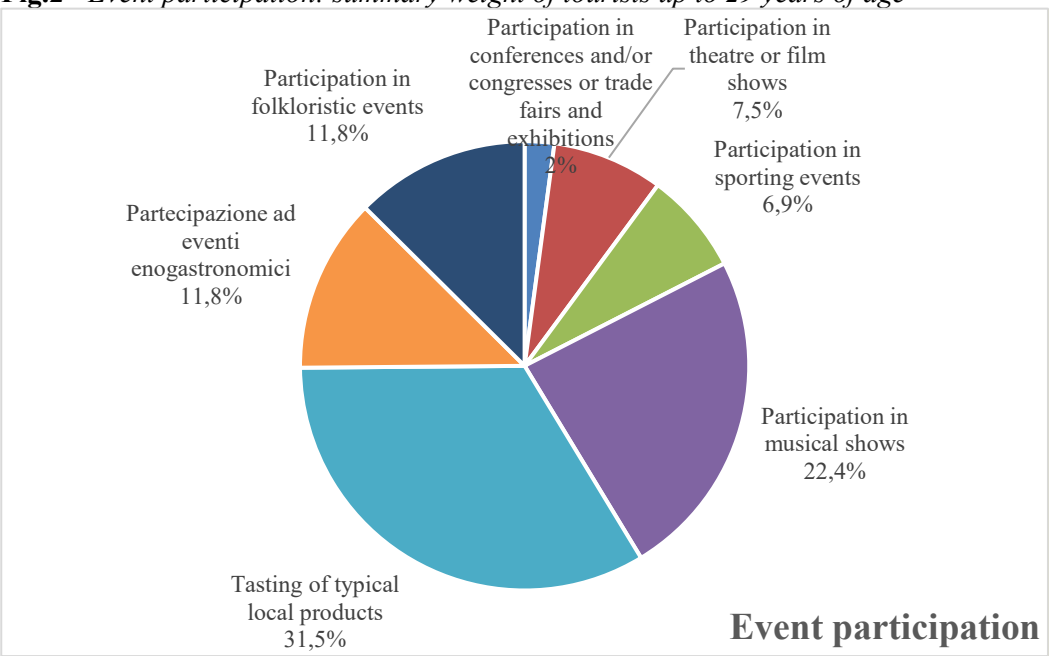
view of the thematic areas and their specific contents by age group, while figures show the weight of specific contents for tourists up to 29 years of age. With regard to 'Sport and wellness activities', the reading of table 1 (and fig. 1) shows two things very clearly. The first is that the younger people are, the more pronounced is the practice of activities requiring greater physical strength. The second is that, on the other hand, as age increases, so does the weight of sports and wellness activities, which, although physically demanding, are more related to an interpretation of slow living. The situation described above finds substantial differences moving on to the thematic area concerning "Event participation" (tab. 2 and fig. 2). Indeed, the analysis of the specific contents brings us to note how interest in local events, tastings, shows of various kinds, etc., is not the prerogative of a specific age group, but a widespread interest also among younger tourists.

Tab.2 - *Event participation by tourists by age group**

Event participation	up to 29 years	30 to 65 years	over 65 years
Participation in conferences and/or congresses or trade fairs and exhibitions	2,0	2,7	1,9
Participation in theatre or film shows	7,5	8,8	11,2
Participation in sporting events	6,9	9,5	
Participation in musical shows	22,4	21,5	23,4
Tasting of typical local products	31,5	33,8	26,2
Participation in food and wine events	11,8	21,4	13,1
Participation in folkloristic events	11,8	21,4	19,6

Source: CReST – Unical: Tourism Survey in Calabria 2014
**: Respondents who answered "YES" by age group*

Fig.2 - *Event participation: summary weight of tourists up to 29 years of age*



Source: CReST – Unical: Tourism Survey in Calabria 2014

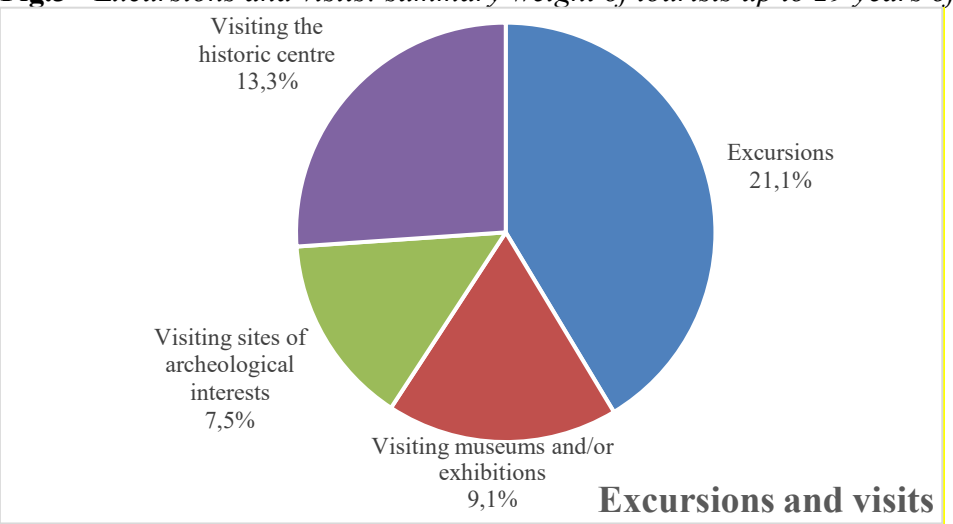
A situation quite similar to what we would have expected can be observed in the case of the thematic group 'Excursions and guided tours' (tab. 3 and fig. 3). While excursions to the local area and visits to museums and exhibitions see the prevalence of tourists in the younger age group, visits to sites of archaeological interest or historical centres see a greater presence of older tourists.

Tab.3 - *Excursions and visits by tourists by age group**

Excursions and visits	up to 29 years	30 to 65 years	over 65 years
Excursions	21,1	20,7	12,1
Visiting museums and/or exhibitions	9,1	11,6	8,4
Visiting sites of archaeological interest	7,5	16,0	13,1
Visiting the historic centre	13,3	26,8	16,8

Source: CReST – Unical: Tourism Survey in Calabria 2014
*: *Respondents who answered "YES" by age group*

Fig.3 - *Excursions and visits: summary weight of tourists up to 29 years of age*



Source: CReST – Unical: Tourism Survey in Calabria 2014

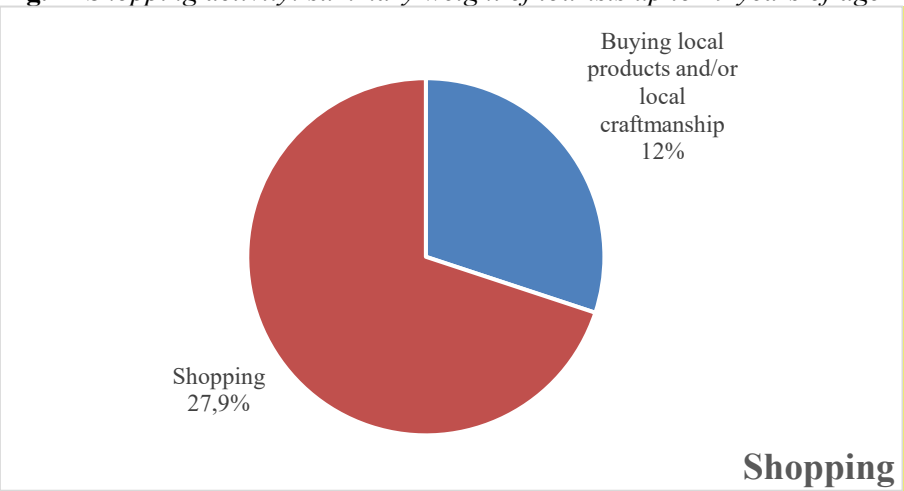
Lastly, with regard to the group we called "Shopping", we can point out that it is not strictly correlated with the age of the tourists, but with the type of purchases made (tab. 4 and fig. 4).

Tab.4 - *Shopping activities of tourists by age group**

Shopping	up to 29 years	30 to 65 years	over 65 years
Buying local products and/or local craftsmanship	12,0	26,4	18,7
Shopping	27,9	33,8	15,9

Source: CReST – Unical: Tourism Survey in Calabria 2014
*: *Respondents who answered "YES" by age group*

Fig.4 - *Shopping activity: summary weight of tourists up to 29 years of age*



Source: CReST – Unical: Tourism Survey in Calabria 2014

5. Final considerations

Youth tourism is a growing social phenomenon. In this regard, there is no doubt that the new information and communication technologies, and the marked drop in the cost of airline flights, have contributed decisively, making it theoretically possible for young people too to reach any destination in the world, and to plan and design their travel through the web and independently.

These assertions seem to be confirmed by surveys on youth tourism, in particular those carried out by the World Tourism Organisation estimated the number of young people who travelled the world each year before the Covid-19 pandemic at over two hundred million, the turnover generated by youth tourism at over forty million dollars, and Europe, North America and some important South American countries as the main generators of youth tourism.

These studies, along with others, have all highlighted the main travel motivations of young people. Their own personal education, of knowledge and life, is one of the most important motivations. This is reminiscent of the so-called Grand Tour, i.e. the 18th century travel undertaken with the same motivations by young people belonging to the European aristocracy. Among other relevant motivations, there is also the expansion of direct knowledge of other cultures in a comparative view with their own, as well as personal knowledge of ways of life and economic systems different from those in which they live or grew up. Of course, of absolute importance is the recreational and holiday aspect.

The last-mentioned aspect remains predominant when the tourist path of young people takes the form of sedentariness. We have seen how in the case of private holiday home tourism, young people, as we have previously defined them, compared to the less young, tend to take advantage of all the opportunities offered by the location in which they are on holiday.

In conclusion, this is a phenomenon of certain interest to anyone intending, even in instrumental terms, to acquire in their own territory increasing segments of this interesting type of tourist.

Bibliography

Carr, N. (2002a). A Comparative Analysis of the Behaviour of Domestic and International Young Tourists.

Carr, N. (2002b). Defining Young Tourists Visiting Beach-oriented Resorts: A Behavioral Analysis.

De Salvo P., Perri. A., Romita T. (2021). Heritage tourism and landscape: the role of memory for local development. In: Cekani I., D'Ovidio F. D., Favia F, Iaquinta P., (eds.), 5th UNICART International Conference "Food, Sustainability, Nutrition and Tourism", Abstracts Book, Embassy of Republic of Liberia in Rome / Lab Instruments s.r.l, Castellana Grotte, Bari (Italy), 23 - 25 November, IARC-ETQA Publishers, Tirana-Bruxelles, ISBN 978-2-931089-18-7

Horak, S., & Weber, S. (2000). Youth Tourism in Europe: Problems and Prospects. Tourism Recreation Research.

Moisă, C. (2010a). Aspects of the Youth Travel Demand. Annales Universitatis Apulensis Series Oeconomica.

Moisă, C. (2010b). Conceptual Clarifications Regarding Youth Travel. Revista Tinerilor Economisti.

Moisă, C. (2010c). Factors Influencing the Evolution of Youth Travel. Management and Marketing Journal.

Moisă, C. (2010d). The Distinctiveness of the Youth Travel Product. Annales Universitatis Apulensis Series Oeconomica.

Moisă, C., & Minciu, R. (2009). Fundamental Aspects Regarding Youth and their Decision to Practice Tourism. Annales Universitatis Apulensis Series Oeconomica.

Perri A., Romita T.. (2020). "Nuove tecnologie e mobilità turistica". Fuori Luogo. Rivista di Sociologia del Territorio, Turismo, Tecnologia, Anno IV – Volume 7 - Numero 1 - Settembre 2020 FedOA - Federico II University Press, pp. 117-123

Romita T, Favia F (2013). Families' Self-Made Tourism: Meeting and Socializing in Residential Social Tourism. In: Jolin L, Diekmann A, (eds.):, Regards croisés sur le tourisme social dans le monde. L'apport de la recherche.. p. 215-227, Presses de l'Université du Quebec.

Romita T (2013). Lifestyles and Consumption of Do-It-Yourself Residential Tourists in Italy. In: Zoran Roca (ed.):, Second Home Tourism in Europe. Lifestyle Issues and Policy Responses.. p. 263-283, FARNHAM:Ashgate.

Romita T., (2021). Unicità ed autenticità nell'esperienza turistica del turista residenziale delle radici., in d'Ovidio F.D., Favia F., Iaquinta P., (eds.), Exploring the Roots. Maps of a New but Ancient Tourism - UNICARTOURISM Selected Papers, IARC-ETQA Publishers: Tirana-Brussels, pp, 121-130.

Romita T. (2020). Temi di sociologia del turismo. International Academic Research Center (IARC): Bruxelles.

Romita T., Perri A. (2021). Strumenti per un nuovo protagonismo turistico delle comunità locali: la soggettivazione della offerta turistica. In Cekani I. D'Ovidio F. D., Favia F. (eds.), Up to the Roots: Tourism Sustainability, Health, Food, and Culture - UNICART Selected Papers, Vol. 2., IARC-ETQA Publishers: Tirana-Brussels, pp, 281-296

Savelli, A. (2003). Sociologia del turismo. Bologna: FrancoAngeli

Savelli, A. (2004). Turismo, Territorio, Identità. Ricerche ed Esperienze nell'Area Mediterranea. Milano: FrancoAngeli.

Staffieri, S. (2012). Italian Youth Tourism Experience Research. Atlas annual conference 2012 - Recreating the Global City: Tourism, Leisure and Mega-Events in the Trasformation of 21st Century Cities.

Staffieri, S. (2012). Strategic Methodologies to Study Youth Tourism in Italy. Geography of Leisure and Tourism Research Group (GLTRG) PhD Conference. University of Surrey - Faculty of Business, Economics & Law - Guilford - United Kingdom.

Staffieri, S. (2016). Nuove Conoscenze: L'Esperienza Turistica dei Giovani Italiani.

United Nations World Tourism Organization., & World Youth Student & Educational Travel Confederation. (2008). Youth travel matters: Understanding the Global Phenomenon of Youth Travel. Madrid: World Tourism Organization.

United Nations World Tourism Organization., & World Youth Student & Educational Travel Confederation. (2011). The Power of Youth Travel. World Tourism Organization.

UNWTO and WYSE Travel confederation, Global report on the power of Youth Travel volume thirteen, 2016.

WYSE Travel Confederation - World Youth, Student and Educational Travel Confederation (wysetc.org).

WYSE Travel Confederation (2014) The Milennial Traveller Survey

WYSE Travel Confederation (2018) The Global Survey of Youth and Student travel

Sitografia

Definitions WYSE Travel Confederation (wysetc.org)

Il primo UNWTO Global Youth Tourism Summit in Italia | Enit.it (Italiano)

Il turismo giovanile (uniroma1.it)

Turismo giovanile: quali sono gli ultimi trend? Geo International

Istat.it Viaggi e vacanze degli italiani, vari anni.

ISBN: 978-2-931089-30-9

Enhancement of the combination of music and culture

Giovanna DODARO*
Calabria University - Italy

Abstract: The cultural heritage in a country like Italy constitutes a strategic resource for tourism, in fact, we speak of "Musical Tourism".
The purpose is to support musical tourism as a national priority through a strategic vision and as an added value to enhance tourism and enhance the beauty of a territory, which is also sustainable and innovative, always guaranteeing respect and balance for the environment and of nature.
There is talk of different musical targets, from international rock to classical opera, moreover, it is evident the presence of a younger audience attracted by the possibility of knowing places through musical entertainment and at the same time eager to have fun through music, shows and festivals of all kinds.
Precisely for this reason, the link between culture and tourism is evident, as cultural heritage represents one of the fundamental points of tourism and, the latter, constitutes a necessary tool to guarantee the knowledge and dissemination of our cultural heritage, allowing the enhancement of the same.
In the era of Covid-19, the cultural sector linked to events such as concerts, festivals, live music and museums was certainly one of the sectors most affected by the pandemic, having suffered a downsizing from social distancing measures.
But, there was no lack of opportunity to develop free digital content as online cultural experiences which certainly do not replace live experiences, but which seek to maintain dialogue with the "public" and above all as a means of distraction from isolation.
Undoubtedly, the Pandemic with the measures of isolation and social distancing has made evident the importance of art and culture for the social well-being of people, aimed at promoting the integration of cultural heritage and digital technologies.
After the Covid-19 health emergency, the aim is to strengthen the virtual presence of cultural activities that is capable of adapting to new times as digital and social innovation, without ever losing sight of the enhancement of cultural heritage.
The attention we are trying to give in these times is to encourage greater information and above all greater involvement by the public as a right to enjoy culture, and even more to have a "broad" conception of culture which together with creativity entail the social well-being of all.

Keywords: cultural heritage, digital and cultural innovation, positivity

1. What function could music have?

Over time, music has proved to have a more decisive role than one might imagine, as an important vehicle of messages, of socio-cultural changes, in addition to its function of entertaining in the normal activities that accompany our life.

* Corresponding Author: giovanna.dodaro@hotmail.it

What is certain is that music can improve the psychophysical well-being of man with an effect on mood. In addition to the positive effects that derive from listening to music, it is also possible to play it, in fact, playing an instrument, like any other training, allows you to obtain beneficial effects from a physical, psychological and social point of view.

In addition to physical well-being, music takes on a different function, it is able to represent a real shot of the socio-cultural context within which it is located.

Describing its characteristics, it can also be understood as a vehicle for study and rediscovery of uses, customs and traditions of a specific territory.

Therefore, musical training can also be considered as an alternative form of school training.

Through an intellectual and social operation, music can be the vehicle for relaunching places and cultural sectors of a country through a process of enhancing the history and culture of the territory, thanks also to the possibility of spreading through the Internet and wi- fi.

We must think of musical tourism as an added value to enhance tourism and enhance the beauty of a territory, and which also manages to be innovative and sustainable.

2. The creative and cultural sectors in the Covid-19 era

During and after the Covid-19 health emergency, music was certainly the most damaged sector. The cultural and creative sectors (SCC) across Europe have been hit hard by the Covid-19 emergency.

In Italy, as early as February 2020, all live events and shows have been canceled, while theaters, museums, concert halls, live clubs and cultural spaces have stopped their activities to safeguard public health.[1]

Tab.1 *Data calculated on September-December 2019 and December 2020 on the tragic collapse of turnover for music and culture, v.%*

TYPES	DECEMBER 2019	SEPTEMBER 2019	DECEMBER 2020	DECEMBER 2019/2020
BOOKS	23%	24%	25%	+9%
NEWSPAPER	17%	18%	19%	+12%
MAGAZINES AND COMICS	20%	16%	16%	-20%
PAID TV	27%	41%	37%	+37%
CINEMA	38%	6%	nr	-84%
THEATER	10%	1%	NR	-90%
MUSIC	14%	6%	11%	-21%
LIVE CONCERTS	9%	1%	nr	-89%
OUTDOOR SHOWS	5%	2%	nr	-60%
CULTURAL FESTIVAL	7%	1%	nr	-86%
EXHIBITIONS AND MUSEUMS	21%	8%	nr	-62%

Source: Corporate Culture Observatory Italy-Confcommercio and Swg

[1] https://www.lamusicachegira.it/documento-programmatico-la-musica-che-gira/

The consequences that the pandemic has caused has certainly been of enormous measures and has repercussions in most of the aspects concerning cultural participation.

According to SIAE data, the 2020 budget closes with a loss of 3.8 billion euros. The loss was not only economic (-77.4% at the box office), but also of admissions (-72.7%) and shows (-69.4%) and was differentiated by type of shows. The concert activity suffered the most, with a loss of 83% of spectators and a drop in box office spending of 89%. The impact on the theater is also heavy, due to both the abrupt interruption that took place starting from the second half of February 2020 and the second lockdown at the start of the 2020-2021 season. The same negative trend is signaled by the analysis of cultural participation outside the home with a sharp decline for the use of theatrical performances (15.7% compared to 20.3% in 2019), visits to museums and exhibitions (27.3% compared to 31.8% in 2019).[2]

We have seen how the world of music is still slowly restarting and it is difficult to make a forecast on the actual restart of the activities, as the music sector was among the first to stop and will be among the last to restart. Live events starting from March 2020 faced a profound period of crisis given the impossibility of keeping theaters, concert halls and all the places where it was possible to perform open to the public.

Furthermore, according to the data presented by Symbola Unioncamere in 2018, the entire cultural sector is worth 92 billion euros, 6.1% of the wealth produced in the country in 2017. For every euro produced by culture, 1.8 in the rest of the economy. The entire supply chain thus produces 255.5 billion, 16.6% of GDP. Culture and creativity employ 6.1% of the total employed in Italy, 1.5 million people.[3]

Tab.2 *Analysis of the last 20 years of participation in live performances, v.%*

Participation in live shows	
2000	30,2%
2010	36,1%
2013	30%
2014-2019	33,3%
2020	27,6%

Source: Istat

The first moment concerns the period 2000-2010 where it is possible to observe a continuous growth in the use of live shows from 30.2% to 36.1%.

Between 2011 and 2019, the trend is decreasing until it reaches the minimum participation rate in live shows in 2013 of 30%.

2020 marks the lowest point of participation in live events, with a share of users falling to 27.6%, such a low level had never been reached in the last 20 years.

The cinema sector also encountered numerous difficulties starting from March 2020. According to Istat data, in 2020 it is estimated that 45.3% of the population aged 6 and over went to the cinema at least once in the last 12 months.

Tab.3 *Types of cinema attendance, year 2020,v.%*

Occasional frequency (1 to 3 times in a year=	30,7%
Regular frequency (4 to 6 times)	9,5%
More assiduous frequency (7 or + times in a year)	5,1%

Source: *Istat*

It is noted from Istat data, as an effect of the pandemic situation, compared to 2019, the share of spectators who went at least once in the last year significantly decreased (-3.2%).

[2] https://www.istat.it/it/files//2022/09/Tempo-libero-e-partecipazione-culturale_Ebook.pdf
[3] https://www.lamusicachegira.it/documento-programmatico-la-musica-che-gira/

 ISBN: 978-2-931089-30-9

According to a research by Centro Studi Doc, during the pandemic, due to the lack of aid and certainties, 21% of professionals in the sector changed jobs.

Furthermore, according to a survey by the Centro Studi Doc, the loss for the entertainment world from 2019 to 2020 was 8 billion euros and 21% of workers, more than half of whom are not currently looking for a new job in this world because it believes that it does not give guarantees for the future. According to the analysis, 13% of the total people involved in the research are show business technicians. The research shows that the crisis has mainly affected women and workers between the ages of 30 and 50 with a dependent family or with a mortgage.

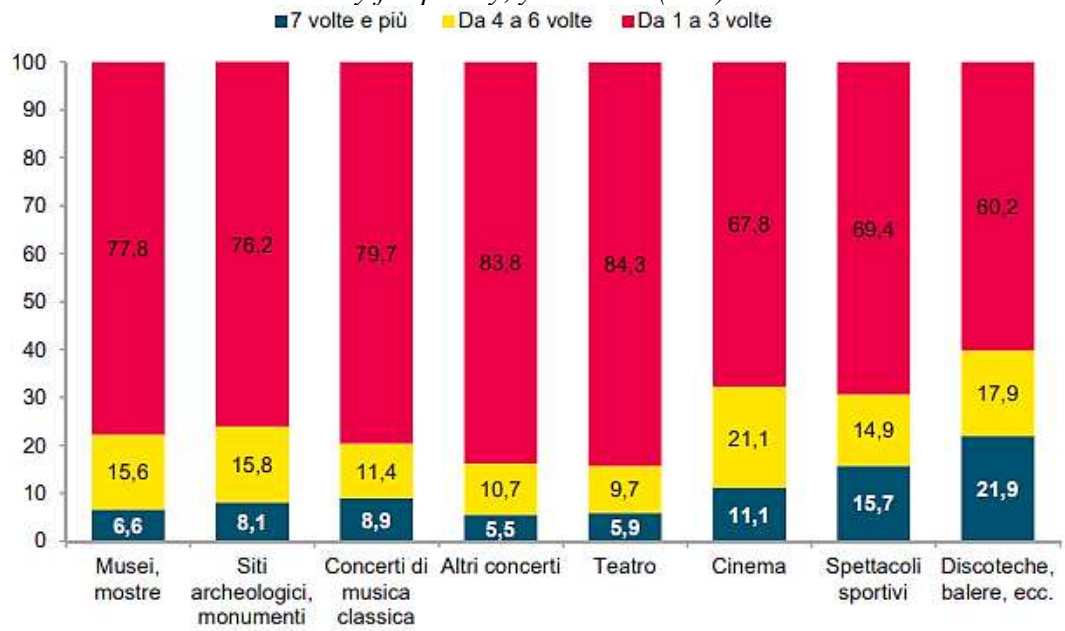
3. Cultural participation in pandemic times

According to Istat data, in 2020, 60% of the population aged 6 and over participated in some form of entertainment or entertainment outside the home, down from 64.6% in 2019.

The decrease recorded affects all cultural activities, in particular theatrical performances (-4.6% points compared to 2019) and visits to museums and exhibitions (-4.5% points). Compared to 2019, the share of those who carried out a maximum of three activities remained stable (39.5% compared to 39.9% in 2019), while that of those who carried out four or more decreased from 24.7 to 20, 5%.

Again according to Istat data, over 70% of those who go to a museum / exhibition or archaeological site / monument do so at most three times a year.

Fig. 1 *Persons aged 6 and over who have enjoyed the different types of shows and / or entertainment outside the home by frequency, year 2020 (v.%)*



Source: *Istat*

It is noted that the share of the strongest visitors to museums and exhibitions is found among 18-19 year olds which is 10%, however, for people aged 65 or over it is about 9%. Among visitors to archaeological sites and monuments, the share is between 18 and 34 years old and in particular the 20-24 year olds which is 12.4%.[4]

As for classical music concerts, the share of spectators is doubled if we also consider the other types of concerts equal to 17%.

[4] https://www.istat.it/storage/ASI/2021/capitoli/C10.pdf

Among the forms of cultural participation that suffered a clear decline in 2020 compared to 2019 is theater, which is equal to 15.7%. The highest shares of spectators are found among children and young people up to the age of 19, in fact the share for children aged 6-10 is equal to 22.8%, for children aged 18-19 the share is equal to 27 %.[5]

For the cinema, a distinction is made between children aged 6-10 years 67% and children aged 18-19 78%. Surely the percentage of participation in the cinema decreases with increasing age, in fact it goes for people aged 25-34 to 61.5% and for the elderly between 65 and 74 years to 23%, up to people of 75 years and more equal to 8%.[6]

Even for sports shows, in 2020, just over a fifth of the population aged 6 and over went to a sports show. It is above all children and young people between the ages of 11 and 24 who make the most of it: the highest turnout is recorded among the 11-17 year-olds (36.6%). From the age of 25, on the other hand, the levels of use decrease significantly: with values below the national average from the age of 55, reaching 11.4% among people aged 65-74 and just under 5% in the population aged 75 and over.[7]

As for discos, the share of those who go there seven times or more during the year is equal to 21.9%, with peaks of 33.2% among young people aged 18-24 and 38, 6% among seniors aged 65 or over.[8]

Secondo i dati Istat, la televisione nel 2020 trova riscontro tra i giovanissimi e gli over 55anni e, in particolare, fino ai 10 anni oltre il 94 % delle persone la guarda e anche dai 55 anni in poi. Invece, per quanto riguarda l'ascolto della radio il 46,2 % degli ascoltatori della radio lo fa quotidianamente, in diminuzione di 5,8 punti %, il calo può essere collegato alla diminuzione di coloro che la ascoltavano negli spostamenti casa-lavoro impediti a causa della pandemia.

The situation concerning the reading of newspapers reaches 32.5% of the population in 2020, a decrease compared to 2019, the decrease is 2.9% points. Reading newspapers, on the other hand, is mostly reflected in adults, in fact, only about 8.2% of children aged 11 to 14 read at least one in a week, rising to about 21.7% among the 20- 24 years old.

Newspaper readers amounted to 33.3% among the 35-44 year-olds, while they reach the highest share among the over-65s equal to 44.3%.

Another important data concerns the use of libraries, compared to 2019 there is a net decrease attributed to the closure of universities and schools.

Tab.3 *People who watch television, listen to the radio or go to the library and read newspapers or books, year 2020*

YEARS	They watch TV regularly	They listen to the radio regularly	They read newspapers at least once a week	They've been reading books for the past 12 months	They go to libraries
2012	92,5	58,4	52,1	46,1	-
2013	92,3	57,3	49,5	43,1	-
2014	91,1	56,8	47,1	41,5	-
2015	92,2	57,9	47,1	42,0	-
2016	92,2	53,0	43,9	40,5	-
2017	91,6	54,6	40,6	41,0	-
2018	92,4	58,3	38,0	40,6	-
2019	91,1	58,8	35,4	40,0	15,3
2020	91,0	56,4	32,5	41,4	12,4

Source: *Istat*

[5] Ibidem
[6] Ibidem
[7] Ibidem
[8] Ibidem

According to Istat data, cultural participation, after the significant decline between 2019 and 2020, passing from 35.1% to 29.8%, falls to 8.3% between 2020 and 2021.

Tab.4 *Cultural participation years 2019 – 2020 – 2021, v.%*

Cultural Participation (tout-court)					
2019	**35,1%**	**2020**	**29,8%**	**2021**	**8,3%**
Cinema					
2019	**18,1%**	**2020**	**14,6%**	**2021**	**1,7%**
Theater					
2019	**20,3%**	**2020**	**15,7%**	**2021**	**2,9%**
Music					
2019	**20,2%**	**2020**	**17%**	**2021**	**3,7%**
Museums					
2019	**31,8%**	**2020**	**27,3%**	**2021**	**8,9%**
Books					
2019	**22,3%**	**2020**	**22,9%**	**2021**	**22,9%**
Newspaper					
2019	**25,2%**	**2020**	**24,8%**	**2021**	**23,2%**

Source: *Istat*

4. Conclusions

In relation to the situation described above, observing the drastic data of the culture and music sector that affect from 2020 until today, immediate action should be taken to deal with the negative consequences that will fall on the economic sector of the country and, also, on the socio-cultural sector and the country's ability to produce cultural value.

The shock of the health emergency in 2020 highlighted how participation in live cultural shows and events represent very important ways of expression.

The Covid-19 pandemic has caused continuous changes as regards the world of work, in fact, theatrical performances, exhibitions, concerts, archaeological sites and places of culture have virtually "opened" to the public through the possibilities of the internet an operation of adaptation and transformation to the new context, which was certainly neither simple nor trivial.

It is necessary to imagine a "hybrid" future for culture, that is, both in live and virtual mode to meet all the different needs of the users of culture and, moreover, to be able to build a project that connects music education in schools, institutions of culture and tourism, the media and new technologies in order to start a dignified path of rebirth, exploiting the powerful means of communication and dissemination of which we boast today.

Sitography

https://www.lamusicachegira.it/documento-programmatico-la-musica-che-gira/

https://www.istat.it/it/files//2022/09/Tempo-libero-e-partecipazione-culturale_Ebook.pdf

https://www.istat.it/storage/ASI/2021/capitoli/C10.pdf

ISBN: 978-2-931089-30-9

I festival cinematografici in Italia e il loro legame con il territorio

Ornella CARLINO*
International Academic Research Center, Tirana - Albania

Abstract: Italy can boast of being the home of the oldest international film festival in the world, namely the Venice International Film Festival, the first edition of which took place in 1932. Over the years, however, multiple film festivals have developed on the Italian territory, such as the Turin Film Festival, the Rome Film Festival, the Giffoni Film Festival, the Bari International Film Festival and many others. By now, almost the entire Italian territory hosts film festivals, and each of them possesses its own history and peculiarities, but they are all united not only by the desire to highlight the world of cinema and entertainment, but also by the close connection with the territory. In fact, these cultural events are fundamental in the development of the territory from the tourism point of view, since, by hosting nationally and internationally renowned actors and masterminds, they attract hordes of fans and audiences from all over Italy, and sometimes even from foreign countries. The article, therefore, aims to analyze the phenomenon of film festivals in the Italian area from the perspective of greater development and enhancement of the host territory, while also highlighting the historical significance and evolution that these festivals have had.

Keywords: art; film festivals; tourism and development

1. Etimologia e storia della parola *festival*

È bene iniziare dall'analisi della parola *festival* al fine di comprenderne la sua etimologia, le sue origini e il suo sviluppo nel corso dei secoli.

Da punto di vista etimologico è possibile affermare che questa parola è una voce inglese, derivante dal francese antico *festival*, le cui origini sono a sua volta da ricercare nel latino medievale *festivalis,* 'festivo, piacevole'.

Mentre dal punto di vista semantico tale parola presenta attualmente un duplice significato:

- Festa popolare, spesso all'aperto, con musiche, balli, luminarie con cadenza periodica.
- Serie di manifestazioni e spettacoli, musicali, teatrali, cinematografici; eventi per lo più periodici che sono incentrati su molteplici e differenti temi e argomenti.

Entrambi i significati possono ricondurre a due diversi periodi storici, il primo riconduce a tempi più remoti che trovano il proprio confine verso la metà dell'Ottocento, invece il secondo fa riferimento all'epoca moderna e contemporanea.

In passato queste feste popolari, chiamate *festival,* contenevano in sé anche delle accezioni religiose, ma quest'ultime con il passare dei secoli sono venute meno e i festival sono divenuti per lo più eventi periodici volti alla sponsorizzazione di vari prodotti appartenenti al mondo a cui tale manifestazione è dedicata.

* Corresponding Author: ornellacarlino9@gmail.com

Di conseguenza, da tale analisi emerge la spiccata evoluzione dal punto di vista semantico, storico ed etimologico della parola *festival*, la quale indica eventi e manifestazioni che probabilmente continueranno a subire nel corso degli anni e dei secoli a venire ulteriori e continue modifiche e cambiamenti.

2. L'Italia, patria dei Festival del Cinema

Procedendo con uno studio sul fenomeno dei festival sul territorio italiano, si riscontra che molteplici e variegate tematiche e branche sono diventate e continuano a diventare oggetto centrale di tali manifestazioni a cadenza periodica, ma sicuramente i festival che vanno più per la maggiore in Italia sono i festival dedicati al mondo dello spettacolo, in particolare all'universo cinematografico nazionale e internazionale.

L'Italia, infatti, può essere considerata la patria dei Festival del Cinema a livello mondiale perché proprio sul suolo italiano si svolse nel lontano 1932 la prima edizione del più antico festival internazionale del cinema del mondo, cioè la Mostra internazionale d'arte cinematografica di Venezia. Con il passare dei secoli il territorio italiano è stato arricchito sempre di più dalla nascita continua e inarrestabili di nuovi festival del cinema, generalmente di minore entità rispetto a quello storico di Venezia, che, però, hanno comunque riscontrato a seconda dei casi un maggiore o minore successo. Nei paragrafi successivi verrà fatto un excursus sulla storia di alcuni dei più importanti festival cinematografici presenti in Italia.

3. Mostra internazionale d'arte cinematografica di Venezia

Per risollevare Venezia dalla situazione di crisi che si era creata a seguito della caduta della sua Repubblica, avvenuta nel 1797, nel corso di tutto l'Ottocento si cercarono di attuare iniziative culturali che potessero riportare la città agli antichi fasti.

Così nel 1895 per volere del sindaco Riccardo Selvatico venne istituita l'Esposizione Biennale artistica nazionale, la cosiddetta *Biennale,* il cui prestigio si estese a livello mondiale portando con sé la partecipazione dei maggiori artisti italiani e stranieri.

Questo fu solo l'inizio di un forte periodo di rinascita economica e culturale che vide coinvolta la città lagunare, dove proprio nel 1932, più precisamente dal 6 al 21 agosto, prese vita la prima edizione della Mostra internazionale d'arte cinematografica.

Quest'ultima, che può essere considerata come il primo e più antico festival internazionale dedicato al cinema, nacque da un'idea del presidente della Biennale, il conte Giovanni Volpi di Misurata, e per volere di Luciano De Feo, segretario generale dell'Istituto internazionale della Cinematografia Educativa, e di Antonio Maraini, segretario generale della Biennale. Probabilmente la Mostra internazionale d'arte cinematografica venne ideata non solo per rendere Venezia ancor di più una città dalla forte attrattiva culturale, ma anche per promuovere il settore alberghiero e turistico veneziano, puntando sulla valorizzazione dei neonati alberghi presso il Lido. Infatti, la prima edizione della Mostra si tenne proprio sulla terrazza dell'Hotel Excelsior al Lido di Venezia.

Sin da subito questo festival, sebbene all'inizio non fosse a carattere competitivo, ebbe un incredibile successo a livello internazionale, infatti, vi erano spettatori, giornalisti e maestranze provenienti da ogni parte del mondo e godette, inoltre, dello star system hollywoodiano. La prima edizione del festival, dunque, contò circa 25.000 spettatori, numero che raddoppiò durante l'edizione successiva, mettendo così in evidenza il notevole impatto positivo che il festival in questione ha avuto e continua ad avere sul settore turistico del territorio veneziano. Quindi, sebbene abbia dovuto affrontare battute d'arresto e riforme in vari periodi storici, come ad

esempio durante gli anni della guerra, la Mostra internazionale d'arte cinematografica di Venezia è riuscita a sopravvivere fino ad oggi, incrementando sempre di più il suo successo, ed è destinata a farlo ancora a lungo.

4. Giffoni Film Festival

Di più recente invenzione è il Giffoni Film Festival, un festival cinematografico per bambini e ragazzi che si svolge ogni anno, nel mese di luglio, per la durata di circa dieci giorni, nella città di Giffoni Valle Piana, in provincia di Salerno.

La prima edizione si tenne nel lontano 1971 e nacque da un'idea dell'allora diciottenne Claudio Gubitosi, attualmente ancora direttore del Festival, originario proprio di quel piccolo paesino campano. Gubitosi era un ragazzo con una forte passione per il cinema, per l'arte e per i cortometraggi e proprio da questa sua passione volle partire per creare quello che oggi è considerato il festival del cinema più innovativo e più unico al mondo.

Il Giffoni Film Festival, infatti, è basato su valori quali inclusione, ospitalità, rispetto e confronto, tant'è vero i giurati di questo festival sono bambini e ragazzi sia italiani che stranieri. Questo evento culturale a poco a poco ha contribuito allo sviluppo del piccolo paesino salernitano, soprattutto dal punto di vista turistico, in quanto l'intera cittadella, infatti, si prodiga per offrire ai piccoli giurati e al resto degli spettatori un'esperienza positiva a tutto tondo.

5. Torino Film Festival

Sulla scia del Giffoni Film Festival venne creato poi il Torino Film Festival dieci anni dopo. Il festival torinese, infatti, nacque nel 1981 per volere dell'assessore alla gioventù del comune di Torino, il quale, ispirandosi al festival di Giffoni Valle Piana, desiderava creare un festival cinematografico che fosse incentrato sul cinema dei giovani e degli esordienti con cadenza annuale. Inizialmente, infatti, questo festival venne chiamato *Festival Cinema Giovani*, proprio perché aveva come obiettivo quello di indagare su un cinema "giovane", innovativo e basato su forme sperimentali. Con il passare del tempo il Torino Film Festival ha ampliato il suo raggio tematico, concentrandosi non solo su tematiche cinematografiche, ma anche sociali, e ha acquisito un respiro internazionale, diventando su territorio italiano in questo ambito secondo solo alla Mostra internazionale d'arte cinematografica di Venezia.

6. Festa del Cinema di Roma

La Festa del Cinema di Roma è un festival cinematografico internazionale istituito nel 2006 che si tiene in autunno presso l'auditorium Parco della Musica di Roma. La manifestazione è organizzata dalla Fondazione Cinema per Roma e ha come obiettivo la rivitalizzazione e il sostegno artistico e industriale dell'audiovisivo alla città di Roma e alla regione Lazio attraverso iniziative per la valorizzazione della cultura cinematografica.

7. Bari International Film Festival

Il Bari International Film Festival (Bif&st) è il festival internazionale del cinema e della cultura audiovisiva ideato e diretto dal giornalista Felice Laudadio, già presidente della Fondazione Centro sperimentale di cinematografia.

Ogni anno questo festival conta circa 75.000 spettatori ed incrementa sempre di più il prestigio turistico della regione, complice la strategia volta all'utilizzo dei principali teatri storici della città come location degli appuntamenti del festival.

8. I festival cinematografici e il territorio: il loro impatto sul turismo

È possibile, dunque, individuare tra i festival e il territorio in cui si svolgono un forte legame, basato principalmente sull'impatto positivo che i festival hanno in relazione al settore turistico. Infatti, queste manifestazioni hanno come obiettivi intrinsechi:

- Valorizzazione della città ospitante: un festival culturale aumenta l'attrattività della città e dà origine al turismo culturale.
- Aumento della ricchezza del territorio: questo aumento riguarda soprattutto il settore del turismo e i suoi operatori. A tal fine, vengono create anche strutture per i turisti (servizio navetta, alberghi a tariffa ridotta per la stampa, ecc.).
- Vendita dei prodotti locali e valorizzazione del territorio: un festival culturale consente e promuove una maggiore conoscenza dei luoghi di un territorio, utilizzati anche utilizzati come location per i festival, e delle sue tradizioni.

Quindi, per concludere, si può affermare che i festival cinematografici, ma più in generale culturali, siano un forte mezzo attraverso i quali poter sponsorizzare e valorizzare un territorio e incrementare così il flusso di turismo culturale.

Bibliografia

ARGANO LUCIO, *Gli eventi culturali. Ideazione, progettazione, marketing, comunicazione,* FrancoAngeli editore, Milano, 2005

BRUNETTA GIAN PIERO, *Cinestoria della Biennale*, Venezia, Marsilio Editori 1996

DI MARTINO ENZO*, La Biennale di Venezia 1895-1995 Cento anni di arte e cultura*, Mondadori, Milano, 1995

PIREDDA MARIA FRANCESCA, *I festival del cinema in Italia*, Carocci Editore, 2022

ISBN: 978-2-931089-30-9

Il Nuovo Umanesimo in Italia espresso dai cantautori contemporanei, *veicolo di turismo dell'etica culturale* come identità sociale da condividere

Paola PIERAGOSTINI*
La Decima - Humanity Music Festival - Italy

Abstract: Si tratta di un progetto nazionale che parte dalle Marche ideato dall'Associazione Culturale La Decima proposto attraverso la Rassegna Humanity Music Festival (con sezione online e in presenza in tre città delle Marche) quale omaggio all'arte di Lucio Dalla con il coinvolgimento di artisti di fama nazionale, diretto da Ricky Portera, artista fortemente anticipatario del nuovo umanesimo italiano (affiancato da Maurizio Solieri, Fabio Liberatori e Dario Ballantini).
Portera stesso, musicista e cantautore italiano nato in Sicilia nel 1954, affrontando i cambiamenti epocali della sua vita, nel 2010 in un testo da lui scritto, dal titolo 'Sicilia' ha parlato di 'ragione per sognare' 'bisogno di un nuovo patto d'amore' 'necessità di calore umano nelle relazioni'. Pensieri divenuti canto in musica, che a distanza di dieci anni (in tempi di piena pandemia) nel 2021 sono stati ribaditi nel testo dal titolo 'Prega tu, che prego anch'io per noi' a sottolineare l'urlo dell'anima ribelle dell'uomo artista, compositore in musica e parole dell'espressione del pensiero dell'autenticità di chi sa che oggi è necessaria un'unica forma di ribellione, quella cioè dell'amore per la vita e tra gli uomini.

Keywords: Umanesimo; Incontro; Confronto; Cultura; Musica

Humanity Music Festival

E' una rassegna che prende forma in un concorso nazionale (con la volontà di diventare internazionale). Si svolge in prima edizione nel 2022 e rappresenta un omaggio all'arte espressa in musica e parole dal grande cantautore bolognese Lucio Dalla, morto nel marzo del 2012, di cui quest'anno si celebra il decennale della dipartita. Per questo, l'edizione 2022 è in suo onore, mentre si sta già valutando il nome dell'artista da onorare nell'edizione 2023. Il concorso è aperto a tutti i maggiorenni e prevede come obbligo da regolamento, che i partecipanti si esibiscano in una cover di Lucio Dalla, sostenuta da motivazioni scritte personali e sociali ispirate dal testo della stessa cover, ed un brano inedito in musica e parole. Lo scopo, è quello di stimolare la creatività e l'autenticità degli aspiranti artisti, che parta dalle emozioni proprie, dal proprio pensiero personale e sociale e dal proprio sentire la vita che si trasforma in arte. Il concorso si compone di una sezione online e una in presenza. La prima sezione si è aperta il primo agosto e si chiude il 28 novembre 2022. Al suo termine la competente giuria tecnica composta due storici musicisti: Ricky Portera e Maurizio Solieri, selezionerà otto semifinalisti. Questi si esibiranno sul palco del teatro La Perla di Montegranaro (Fermo) il 9 dicembre 2022, davanti al pubblico ed una giuria in presenza che decreterà quattro finalisti. Sono loro i protagonisti della serata finale che si terrà il 10 dicembre 2022 al teatro Sanzio di Urbino (Pu) da cui emergerà un

* Corresponding Author: paola.pieragostini@libero.it

 ISBN: 978-2-931089-30-9

unico vincitore, decretato da una diversa giuria in presenza. E' nella volontà dei singoli partecipanti (solisti, duo e band) che si concretizza la forza della rassegna HMF, fatta di desiderio di esprimersi e creare relazioni umane tra i concorrenti provenienti da tutta Italia, gli artisti di fama nazionale, i componenti della giuria, il pubblico dei teatri ed i territori e le comunità che li ospita, in questo caso delle Marche. Da qui, la centralità della rassegna umanistica sull'arte musicale, che in quanto tale, unisce intorno all'eredità di una grande cantautore da omaggiare, il nuovo bisogno di fare arte come cultura radicata nella continuità e nello sviluppo di ogni società che progredisca umanamente e umanamente edifichi se stessa.

Premessa

Oggi un nuovo umanesimo che segue la fine dell'età contemporanea, è imprescindibile sia dalle condizioni socio culturali attuali, sia dall'essere veicolato dall'Arte, che nello svolgimento della Rassegna diventa concreto *veicolo di turismo culturale fondato sull'etica umana, che collega territori, artisti di fama nazionale, generazioni diverse, istituzioni e più identità territoriali, unendole nella dialettica della filantropia universale del pensiero del neo umanesimo nell'arte.* Su questo principio di cultura che si fa vita e tempo, si fonda l'Associazione Culturale La Decima, da cui nasce la Rassegna Humanity Music Festival, con la volontà di ri-valorizzare la letteratura del cantautorato italiano dell'età contemporanea, nell'etica del nuovo umanesimo. L'etica cioè, che riporta al valore assoluto dell'uomo e della sua salvifica propensione nel costruire relazioni umane, che diventano linfa per lo sviluppo di ogni comunità locale, nazionale e internazionale. L'etica cioè, che pone il rispetto di ogni essere vivente, come valore imprescindibile del benessere che diventa cultura della vita, della bellezza e delle virtù condivise nella condizione 'dell'insieme'. Le stesse che regolano ogni abbraccio di vita singola che si fa collettiva e si manifesta nello stile di pensiero e azione nella sfera socio culturale che va dalla politica all'economia, dalla famiglia alla comunità, dalla scuola al mondo del lavoro, passando per la spiritualità fatta di rinnovato e ritrovato amore per la sacralità della vita e del tempo da vivere, ognuno secondo la responsabilità del proprio ruolo.

Motivazioni

La Rassegna è volta a riscoprire l'arte delle parole in musica, espressa dai grandi cantautori dell'età contemporanea, con lo scopo di raccogliere la preziosa eredità del pensiero dell'uomo sull'uomo e dell'uomo su Dio, sul tempo e sulle inquietudini d'animo che portano al riscatto personale e collettivo, che i grandi artisti hanno vissuto e interpretato diventando, dono ed eredità del pensiero sociale che inevitabilmente evolve grazie al pensiero degli uomini. Concetto che in Humanity Music Festival, si fa integrazione umana e territoriale fino a divenire rete che collega l'etica dell'arte, all'etica del turismo, che passa attraverso l'uomo e la responsabilità dell'essere tale, espressa con discernimento nell'edificazione personale e sociale, che definisce gli equilibri armonici della civiltà.

Esposizione

Nel rispetto di questa logica, nasce la volontà di creare occasioni di incontro e confronto mirate allo sviluppo e crescita, che risvegli l'identità creativa, figlia dell'ascolto e dello sguardo alle condizioni dell'uomo contemporaneo, sviluppando e potenziando la continuità di quel cambiamento proiettato oltre la situazione socio culturale in cui l'uomo si trova ora, sia sul piano personale che su quello collettivo.

Approccio

Così come l'umanesimo del XV secolo si è manifestato grazie all'impulso di artisti che hanno sentito il bisogno di 'ribellarsi ai cosiddetti secoli bui del Medioevo' esprimendosi nella costruzione di pace e filantropia universale, allo stesso modo, l'artista neoumanista, con la sua vita e arte, riprende, potenzia e sviluppa i motivi centrali dell'umanesimo attraverso l'interpretazione dei valori di identità umana che si fanno sentimento di risveglio della coscienza nel rispetto di ogni diversità.

Conclusioni

In apertura ho scritto 'Il nuovo umanesimo oggi, è imprescindibile'. Lo ribadisco in conclusione, perché questo tempo (che tutti siamo chiamati a vivere come protagonisti nella scelta responsabile di ciò che è bene e ciò che non lo è) chiede la rinascita della cultura, da sempre custodita nel pensiero degli artisti, veri custodi di cambiamenti sociali e veri ambasciatori dell'incontro. Da qui, lo studio del lessico del cantautorato contemporaneo, come dialettica di continuità nell'emancipazione della storia dell'uomo e della cultura dei popoli che nella rassegna HMF diventa promozione e integrazione di turismo etico culturale, che parte dall'uomo contemporaneo di ogni luogo e condizione, per ritornare all'uomo di domani, con la certezza che il tempo affidato ad ognuno, non sia passato invano. Ma sia stato degno di chi ha contribuito alla crescita e allo sviluppo di sé, in piena integrazione con il prossimo.

ISBN: 978-2-931089-30-9

Spiritual Tourism, a Development Factor for Local Saharan Tourism

Khalil SALEM*
Maitre de conférences 'B' FSESCG Oran 2 - Algeria

Abstract: The subject of this contribution is the importance of cultural tourism in general and worship or spiritual or even meditation, especially in the great spaces of the Algerian Sahara. We will deal successively with Saharan tourism, cultural tourism and finally tourism of faith and meditation which has become a factor of development of national tourism. For Algeria, Saharan tourism is a specificity and an additional asset of the Algerian tourist heritage. The Algerian Sahara is a very vast space composed of several natural environments that offer undeniable tourist potentialities consolidated by an ancestral civilization that gives it all the assets of a touristic region.
Internal tourism is certainly not new to the Maghreb, it is emerging in the Saharan regions. For example, every year, hundreds of young Algerians from the north of Algeria climb the dunes of Taghit to wait for the sunrise and the passage to a new year. The Algerian National Office of Tourism (ONAT) promotes the discovery of the desert for citizens in the north of the country by offering tours. It plans to create and manage tourist complexes, especially in the desert. It already owns a hostel in Djanet, inaugurated a vacation village in Igli (two others are planned in Timimoun and Taghit). ONAT signed in August 2017 an agreement with Air Algerie and Tassili Airlines to reduce by half the price of air tickets between the north and the deep south. But internal Saharan tourism in the Maghreb relies primarily on thermalism and particularly on psammotherapy (sand baths), of which Merzouga is one of the high places [Gagnol & Landel 2016].
Algeria has always been a melting pot of diverse beliefs: from the oriental polytheisms to the Jewish, Christian and Muslim monotheisms. Indeed, there are many religious sites in Algeria that constitute places of pilgrimage for communities of various faiths, and they can be restored for tourism purposes. This is the case of the tomb of Rabb Ephraim Enkaoua in Tlemcen, visited in May by the Jewish community of the Maghreb and Europe during the pilgrimage of the "Hailoula" and the product of Saint Augustine in Annaba.
Traditionally, this type of tourism takes the form of ceremonies around local mausoleums. The mawlid, anniversary of the birth of the Prophet, is observed in Kenadsa (Souara) and Timimoun (Gourara)...

Keywords: tourism; cultural; worship; Sahara; development; Algeria;

Table of Contents

I. INTRODUCTION
II. SPIRITUAL OR RELIGIOUS TOURISM
III. SAHARAN TOURISM
IV. SAHARAN RELIGIOUS OR SPIRITUAL TOURISM
CONCLUSION
BIBLIOGRAPHY

* Corresponding Author: skhalil.univ@gmail.com

I. Introduction

The object of our intervention is related to religious or spiritual tourism as a factor of development of local Saharan tourism

Algerian culture is characterized by its diversity, its richness, thanks to its different regions, borrowings from other peoples. Each region, each city or oasis constitutes a particular cultural space. Kabylie, Aurès, Algiers, the High Plateau, the Mzab Valley, Gourara, Hoggar, Saoura, Oranie; all these regions have their own cultural and linguistic particularities.

The first cultural manifestation on the territory of present-day Algeria are thousands of years old, such as the fascinating testimonies of rock art of the tassili n'Ajjer, passing through all the beautiful buildings constructed throughout the history of this country, arriving at craftsmanship which is still very present and extremely wealthy. Algerian art is multiple, it reflects the different chapters of the history.

Numerous museums dedicated to a wide variety of themes, including the National Museum of Fine Arts, rich libraries, such as the National Library of Algeria, and a whole real estate, craft and industrial heritage, testify to the development of Algerian culture.

Algeria is the largest country on the African continent, 2 381 000 km2 (including 2 million for the Algerian Sahara) and the 10th country in the world in total area. Located in North Africa, one of the main tourist attractions in Algeria is the Sahara, the largest desert in the world. Algeria has the highest sand dunes in Africa at Isaouane-n-Tifernine in the wilaya of Illizi.

Algeria has been a member of the World Tourism Organization since 1976, but tourism in Algeria is still in its early stages. Income from tourism does not exceed 10% of gross domestic product and the country ranks 147th in the world. The tourism sector in Algeria represents 3.9% of the volume of exports, 9.5% of the rate of productive investments and 8.1% of the Gross Domestic Product.

This type of so-called internal tourism is socially important but little studied. The concept of spiritual or cultural tourism is called religious, spiritual, cultural, mystical, Sufism or faith.

Historically, it is older than conventional tourism. This is a concept of all religions.

Religious tourism is defined as the way in which the individual comes closer to God as a convinced believer or as a potential believer whose faith is revealed during a trip or visit to a sacred place.

There are different types that can be places, practices or historical facts:

- Pilgrimage or gathering: Mecca, Benares (Hindus), Manila (Christians), Ghrib (Jews)…
- Visiting cemeteries, or studying a religion
- Retreat, meditation, recollection, young...
- Meeting other cultures, civilizations, traditions …

We will successively see spiritual or religious tourism, Saharan tourism, religious or spiritual Saharan tourism.

II. Spiritual or religious tourism

Beyond its spiritual dimension, religious tourism has a cultural aspect exercised by the attraction of its architectural, decorative and historical heritage. It is also similar to educational or learning tourism, whose main motivation is to acquire new knowledge.

Religious tourism, also called faith tourism, is the understanding in the context of tourism of holy places and the visit that tourists of various religious persuasions make to these places for the purpose of pilgrimage, religious gatherings or leisure purposes.

The biggest religious tourism destination is Mecca which attracts 35 million Muslim pilgrims every year. In 2008, this tourism represents an industry of 18 billion dollars and 300 million travellers worldwide.

In the context of the development of free time and religious tourism, some initiatives allow to safeguard, restore and enhance the existing religious cultural heritage, as well as to transmit the wealth of culture to new generations.

III. Saharan tourism

For Algeria, Saharan tourism is a specificity and an additional asset of the Algerian tourist heritage. The Algerian Sahara is a very vast space composed of several natural environments which offer undeniable tourist potential consolidated by an ancestral civilization which gives it all the advantages of a tourist region by Excellency.

Internal tourism is certainly not a novelty in the Maghreb, it is emerging in the Saharan regions. For example, every year, hundreds of young Algerians from northern Algeria climb the dunes of Taghit with friends to wait for the sunrise and the transition to a new year. The Algerian National Tourist Office (ONAT) promotes the discovery of the desert for urban dwellers in the north of the country by offering tours. He plans to create and manage tourist resorts, particularly in the desert. He already owns an inn in Djanet, has inaugurated a holiday village in Igli (two others are planned in Timimoun and Taghit). In August 2017, ONAT signed an agreement with Air Algeria and Tassili Airlines to halve low price of plane tickets between the north and the far south. But internal Saharan tourism in the Maghreb is based above all on hydrotherapy and in particular on psammotherapy (sand baths), of which Merzouga is one of the highlights [Gagnol & Landel 2016].

Saharan tourism can be a real economic asset if the tourist attractions that this region conceals are well exploited in order to transform it into a real pole of attraction for national and international tourism. It can also contribute to the creation of jobs in regions where the possibilities of developing other activities in other sectors are limited.

Algeria has invaluable cultural resources and historical heritage, but unfortunately this type of tourism is practically non-existent in Algeria. It is not yet expressed as a need by the local population, and it remains the prerogative of a foreign visitors. This type of tourism only interests a certain category of people, not the majority. Algeria must enhance its cultural heritage (archaeological site, museums, etc.) in order to popularize its cultural tourism.

IV. Saharan religious or spiritual tourism

Traditionally, this type of tourism takes the form of ceremonies around local mausoleums, but unfortunately the evolution of Algerian society has reduced these events, which can constitute a very important cultural heritage that can supply tourism products.

If Islam is today the religion of the country, Algeria has always been a melting pot of various beliefs: from Eastern polytheisms to Jewish, Christian and then Muslim monotheisms. Indeed, there are many religious sites in Algeria which constitute places of pilgrimage for communities of various faiths, and they can be rehabilitated for tourist purposes. This is the case of the tomb of Rabb Ephraim Enkaoua in Tlemcen, visited in May by the Jewish community of the Maghreb and Europe during the pilgrimage of the "Hailoula" and the Saint-Augustin product in Annaba (which was sold by Tunisians to European tourists under Algerian's nose).

The mawlid, anniversary of the birth of the Prophet, observed in Kenadsa (Souara) and Timimoun (Gourara). This festival generally devoted to the praises of the Prophet during a night

of meditation, prayers and celebration, here takes the form of a pilgrimage which brings together the inhabitants of these ksours and those who have emigrated to the cities or abroad. It is a moment of intense mobilization of the sacred, a space and a time of fervour, which associates the patron saints of these establishments and the prophetic commemoration in a deliberate ambiguity, founding the ceremony as a kind of "collective memorial", according to the happy expression of A. Moussaoui, and restoring the time of the origins of these communities organized around their holy founders.

This is the wandering along the routes taken by the procession, for a day in Kenadsa, a week in Timimoune where all the ksours of Gourara are involved, punctuated by commemorative stops at sacred places (tombs, mosques, headquarters zâwiya, places of brotherly celebration of the holy founders, etc.). Also hospitality during which pilgrims are taken care of by sharing couscous and meats. That of the signs, ultimately, of the definition of oneself, or rather of the "We", referring for example to this problem of the horizontality of human works, as evidenced by the architectural frame, and the verticality of relations with the eternal which appears in this same building (minaret of the mosques, qubba, dome surmounting the tombs of the saints), but also, on the occasion of the festival, through the intermediary of the brandished standards, confronted or associated with the different communities that it reunites.

It is from this perspective that A. Moussaoui finally addresses the more general functions of the Kenadsa and Timimoune pilgrimages. They replay on a rich symbolic and emotional range the times of the origins, the foundations. They participate in the construction of the "We" by recalling the foundations of the communities and the relationships they maintain between them. They evoke, through the assimilation of these pilgrimages to the hajj, the visit prescribed to all Muslims of the holy places illustrated by the Prophet, and thereby the rapprochement between the latter and the local saints, the belonging to a universal vocation to the land of Islam. They transcend a possible opposition between the sacred and the profane by posing in an immemorial way, as a “monument” even adds the author, these Ksourian communities. Nevertheless, the “profane” invades more and more the space and the moment of the party. The urgent intervention of the State, the development of tourism, the decline of brotherhood “zawiya”, etc., bring about a kind of “folklorization” of the latter which also reflects the decline of the old ksours, of their traditional role.

Conclusion

Spiritual tourism has become a new trend in the world. These last years. Its benefits go beyond the simple economic order, since the values it conveys contribute to social life. Spiritual tourism is making new followers to the greatest benefit of pilgrimage localities in Algeria. The need to recharge one's batteries has never been so prevalent in society, it constantly leads with it the search for new places.

Thus, the responsible exploitation of natural and cultural values in the service of the development of spiritual tourism contributes to the creation of jobs and to the strengthening of cultural exchanges and understanding between ethnic groups and religions.

Spiritual tourism is an important factor in economic development, the promotion of moral values, patriotism and the consolidation of national solidarity. Spiritual tourism develops on the basis of belief and culture which are also important values linking all regions of Algeria in general and the Maghreb in particular. Thus, “the country should always promote cooperation in tourism and the participation of economic actors in the development of tourism, including spiritual tourism”.

Algeria should make spiritual tourism a driving force to attract tourists, with the parallel promotion of other tourist service activities, the creation of diversification in order to make

Algerian tourism even more attractive to the contemporary traveller. Consider the development of spiritual tourism as an effective solution contributing to the long-term development of the country, through the creation of jobs and income for local residents, the improvement of inter-cultural understanding, the motivation of conservation of traditional values, to honour the cultural identity of the nation.

Spiritual tourism should be developed to improve the cultural, spiritual and intellectual life of the people and the quality of life, as well as to promote social progress. Spiritual tourism is becoming a popular trend, connecting cultures in people's minds. Algeria has great potential for its development thanks to a deeply varied and rooted culture oriented towards noble spiritual values, beliefs and religious convictions.

Bibliography

- Bartini (Paul), *Le tourisme facteur de développement local*, Pug collection, 2000.
- Alkma, D et Sebti, M., *Le tourisme saharien à travers la valorisation du patrimoine ksourien*. Réalité et alternatives pour un développement durable, 2012.
- Amirou, R., *Imaginaire du tourisme culturel*. Paris : Presses universitaires de France, 2000.
- Arcand, P.*, La conservation du patrimoine des sociétés touarègues du Sahara algérien et le tourisme éco-culturel : critique des politiques culturelles de l 'UNESCO (Mémoire de maîtrise)*. Université du Québec à Montréal. Récupéré d'Archipel, l'archive de publications électroniques de l'UQAM http://www.archipel.uqam.ca/1488/l/M1 0462.pdf, 2008.
- Abderrahmane Moussaoui, *Espace et sacré au Sahara. Ksour et oasis du Sud-Ouest algérien*, L'Homme, 177-178 | 2006, 529-532.

ISBN: 978-2-931089-30-9

Viaggio Gustoso. Spunti di riflessione sul turismo gastronomico

Domenico Antonio BARBUTO*
University of Calabria - Italy

Abstract: For several years gastronomy has become a central part of the tourist experience.
In this context, food tourism, appealing to local products and increasingly provided by certifications, has induced many destinations to focus more and more on the development of their products and consequently on targeted marketing. At the same time, travellers are increasingly aware or determined to taste the gastronomic culture of their holiday destinations. The last 20 years in Italy have been marked by numerous gastronomic influences and the response of Italian gastronomes, to this phenomenon, has been to pay more attention to 'popular' dishes labelled as 'traditional' and characterised by simple techniques.
There can be no gastronomic tourism, without an overview that includes food localities, and the opportunity to learn about both production and cooking, The following article, through a cultural-analytical approach, aims to propose a series of insights into the advantage of this type of tourism in offering its users a kind of acclimatisation and naturalisation culturally characterised and with an even more conscious focus on the idea of sustainability.

Keywords: Culture; Food; Gastronomy; Tradition; Sustainability

Un approccio culturale al cibo

Il termine gastronomia si fa risalire ad un poema di Archestrato intitolato "Hedypatheia" ("Vita di lusso"), scritto nel 350 a.C. circa. In esso l'autore identificava i migliori cibi e bevande (soprattutto pesce e vino) della regione mediterranea, associandoli ai loro luoghi di origine. Di questo poema sopravvivono solo 62 frammenti, citati da Althenaeus nel "Deipnosophistae" ("Banchetto dei sofisti"), un'opera del 228 d.C.

Da una traduzione del 1623 di quest'opera in lingua francese è stato coniato il termine "gastronomie" (Pitte, 2002). La sua popolarità avvenne anni dopo, attraverso un poema di Joseph Berchoux intitolato "La Gastronomie" o "L'Homme des Champs à Table", pubblicato nel 1801. Nel 1835 il termine fu riconosciuto e inserito nel dizionario dell'Académie Française (New Concise Larousse Gastronomy, 2007).

La gastronomia e i suoi ambiti hanno una grande importanza nel contesto del turismo; possono agire come servizi e attrezzature essenziali o come attrattive a sé stanti. La gastronomia ha anche un forte legame con l'ospitalità, che è un insieme di pratiche associate all'accoglienza, all'ospitalità, all'alimentazione e all'intrattenimento dei visitatori (Lashley e Morrison, 2001). La commensalità - l'atto di condividere un cibo o un pasto - è uno dei principi fondamentali dell'idea non solo di accoglienza, ma anche per stabilire e mantenere legami tra gli individui.

* Corresponding Author: domenico.barbuto@unical.it

La preparazione, il servizio e il consumo di cibo sono più che semplici atti nutrizionali. Come ha osservato Alvarez (2002), l'alimentazione umana è un evento sociale e culturale in cui la scelta e il consumo di cibo mettono in gioco un insieme di fattori ecologici, storici, culturali, sociali ed economici; è collegata a una rete di rappresentazioni, rituali e simbolismi. Il cibo è una forma di comunicazione (Barthes ,1997).

Così, gli individui appartenenti alla stessa cultura tendono a condividere modelli alimentari, trasformando le conoscenze associate al cibo in importanti riferimenti identitari, che hanno un grande valore nel contesto del turismo contemporaneo (Richards, 2002). In un mondo sempre più simile, le cucine regionali si sono rivelate punti di resistenza ai progressi dell'industria alimentare e alla continua minaccia della standardizzazione, assumendo la forma di un "rifugio alimentare" (Poulain, 2002). La gastronomia può quindi essere un segno di distinzione e un elemento di competitività per le destinazioni turistiche.

Se da un lato la gastronomia globalizzata, i metodi di conservazione e le reti di distribuzione assicurano che i prodotti siano disponibili ovunque e quasi sempre; dall'altro la questione della provenienza è raramente sollevata. Spesso, solo la data di scadenza e le informazioni sull'etichetta influenzano l'acquisto. Tuttavia, si può sostenere che se il cibo deve offrire qualità ed essere veramente attraente, dovrebbe essere identificabile, provenire da terreni agricoli certificati in un particolare, portare un nome che sia associato a un'area geografica e alla sua storia.

Se la qualità deve essere genuina, deve essere garantita con fertilizzanti naturali e tecniche agricole rispettose dell'ambiente che rendono l'economia agraria non solo redditizia ma anche sostenibile. Oltre a questo, l'esperienza di un viticoltore o la creatività di un cuoco l'originalità di un vino o di un piatto, aumentando le probabilità di successo e di diffusione.

La produzione locale su piccola scala non è stata relegata in un passato remoto, ma rappresenta il superamento della standardizzazione e un percorso verso il futuro.

Negli ultimi 20 anni, l'Italia ha valorizzato le sue produzioni agricole e zootecniche, per le quali ha fissato obiettivi di qualità nonostante le quantità prodotte siano spesso modeste. Questo ha portato alla riscoperta di antiche varietà. Anche in ottica industriale, come per esempio nella produzione di pasta, si è tornato al grano duro e a forme dimenticati nella corsa al profitto degli anni '80. Riscoprire una specie vegetale inficiata da una resa apparentemente modesta, ma di ottima qualità, e offrendo spaghetti che cuociono bene grazie alla selezione delle sementi e alla grande cura di tutto, sono sviluppi che stanno dando notevoli benefici.

La qualità crea un mercato, purché la qualità sia conosciuta e riconosciuta.

In Italia, la scoperta dei cibi locali risale agli anni '30, quando le prime guide gastronomiche hanno permesso al pubblico di scoprire le specialità regionali, ma è negli ultimi 20 anni che la pratica è cresciuta considerevolmente. Le cause di ciò sono ben note: l'impero agroalimentare in espansione con i suoi organismi geneticamente modificati (OGM) e le reti globalizzate, l'estinzione dei vegetali e delle razze animali nonché la crescente rarità della produzione di qualità. A guidare la carica contro questo declino agricolo e gastronomico sono state le etichette e i marchi, a cominciare da quelli riconosciuti dalla comunità europea: la denominazione d'origine protetta (DOP) e l'indicazione indicazione geografica protetta (IGP). Il proliferare delle garanzie è una conseguenza logica della critica alla produzione di massa.

A ciò si aggiunga che gli ultimi 20 anni, in Italia, sono stati caratterizzati da numerose influenze gastronomiche: i cocktail dalla cultura del sud americano, il pesce dalla cucina giapponese, la carne dal kebab, le verdure dal vegetarismo e dal crudismo, il fast food da McDonalds e dalla pizza, la cui identità è sempre più indistinta. La cucina che è (apparentemente) "senza cucina" ha conquistato dei fan grazie alle reti di ristoranti stranieri, alle reti di distribuzione (*take-away*), la facilità di consumo del cibo e il desiderio di fast food. La risposta dei gastronomi italiani a questo fenomeno è stata quella di prestare maggiore attenzione ai piatti "popolari" etichettati come "tradizionali" e caratterizzati dalla semplicità delle tecniche, come la cottura lenta, e la disponibilità occasionale di ingredienti preferiti per la loro stagionalità. L'uso del

termine "tradizione" per descrivere queste pratiche è volutamente ambiguo perché evoca una storia del cibo e una continuità che è stata alterata dalla modernizzazione. Tuttavia il successo dello Slow Food e l'introduzione di etichette specifiche per i comuni, hanno fornito un assist alla modernizzazione. In Italia, oggi, il futuro si trova più che mai nel passato recente.

Lo Slow Food internazionale lotta da 20 anni per imporre un approccio prevalentemente culturale al cibo, radicato nel rispetto degli animali, delle piante e dei contadini - e per lo sfondo rurale della gastronomia. La standardizzazione di un mondo soggetto agli stessi metodi di produzione non ha né gusto né sapore. Al contrario, la ricompensa si sente quando si assaggia un cibo che proviene da un arte individuale che si identifica con un luogo specifico. I viaggiatori e i turisti sono ora desiderosi di conoscere e godere dell'ospitalità locale.

Si stanno sviluppando prodotti che fanno leva sulla curiosità dei visitatori e sul loro desiderio di nuove scoperte. Poiché non esistono modelli gastronomici nazionali che abbiano colonizzato tutto il mondo, ogni paese è in grado di offrire i propri prodotti, le proprie tecniche e il proprio stile di consumo.

Senza un quadro d'insieme che comprenda la localizzazione del cibo e senza la possibilità di conoscere sia la produzione che la cucina, non ci può essere turismo gastronomico.

Le politiche del governo italiano, attraverso l'Istituto Italiano per il Commercio Estero (ICE) hanno promosso tutti i prodotti che condividono il "Made in Italy". Ancora più influente, il movimento Slow Food, guidato da un'associazione internazionale senza scopo di lucro, ha promosso l'agricoltura e l'allevamento locali e la qualità non solo in termini di etichette e fatturato, ma come culmine della natura, dell'impegno umano e del consumo da parte di persone che conoscono e si preoccupano di ciò che è sulle loro tavole.

I consumatori e i turisti, dal canto loro, partecipano indirettamente al processo di produzione. I consumatori sono sempre stati importanti perché il loro potere d'acquisto contribuisce a garantire il futuro e il successo commerciale di determinati prodotti. Tuttavia, in gastronomia, ci vogliono conoscitori per assaggiare e analizzare ingredienti o piatti. Un conoscitore e un produttore sono reciprocamente indispensabili e si sostengono a vicenda. Lo stesso vale per il turismo gastronomico.

"Nel turismo enogastronomico la dimensione esperienziale è fondamentale e lega a volte per sempre il turista ai luoghi, ai prodotti e alle comunità del cibo visitate, perché il suo coinvolgimento diretto, l'esperienza immersiva e le emozioni plurisensoriali, della vista come dell'olfatto, del palato come del tatto, creano memorie e ricordi che perdurano e portano, ad esempio, il turista tornato a casa ad acquistare i prodotti assaggiati in vacanza nei mesi o anche anni successivi: la convivialità, la serenità della tavola e della socialità durante i pasti fanno il resto. Per questo il cibo è uno dei prodotti più fotografati e condivisi sui social, da Instagram a Twitter a Facebook." (Guidoni, 2019)

È fondamentale che il turista gastronomico condivida le sue esperienze per beneficiarne: i promotori devono essere consapevoli della necessità di assicurare che i viaggiatori devono essere motivati, sia intellettualmente che con ciascuno dei loro sensi.

Le visite alle fattorie e ai produttori, la conoscenza diretta dei mercati e dei punti di distribuzione e degustazioni di prodotti non sono che i preliminari di una conoscenza esaustiva di come un paese si nutra.

Reti di ospitalità che promuovono i prodotti locali

Il turista gastronomico che esplora il cibo di un paese in cui soggiorna per la prima volta, lo fa generalmente nei ristoranti. È leggendo un menù tradotto nella propria lingua, o spesso in inglese, che si scoprono certi prodotti e piatti. Questa lettura è il fattore scatenante, eppure può essere fuorviante: solo la conoscenza del territorio e la familiarità di lunga data con le

sue tradizioni alimentari può trasmettere una conoscenza strutturale del cibo e porre le basi per una vera comprensione. La familiarità si costruisce lentamente maneggiando e assaporando gli ingredienti. È quindi facendo delle deviazioni attraverso i campi, stalle e porti di pesca, visitando i mercati e facendo prove critiche successive, che si diventa iniziati alla gastronomia. Gustare appieno, ogni tipo di cibo richiede competenze e conoscenze culturali. Perché ciò sia possibile, il turista deve essere assistito, consigliato e guidato.

C'è una barriera che è più difficile da superare della lingua quando si viaggia in un altro paese, ed è il gusto: la percezione e la classificazione dei sapori e l'apprezzamento dei piatti e di come vengono presentati. Questa è una realtà che spesso rimane ancora più misteriosa dei nomi dei piatti.

I turisti hanno quindi bisogno di un'assistenza che li inizi alla gastronomia. Questo non è necessariamente vero solo in ambienti esotici: saper mangiare può porre seri problemi anche all'interno del proprio paese. Ogni italiano, quando viaggia, sa che la pasta al dente può variare da nord a sud. Un settentrionale in Puglia potrebbe ritenere gli spaghetti non sufficientemente cotti, mentre un pugliese a Milano potrebbe trovarli mollicci e troppo cotti.

La maggior parte delle guide turistiche fornisce informazioni troppo succinte per essere veramente utili; nella maggior parte dei casi si limitano a fornire una vaga idea di come mangiare a buon mercato, fornendo i nomi di alcuni piatti noti. Il primo incontro con la nuova cucina può iniziare nel paese d'origine del viaggiatore, per esempio un piccolo ristorante coreano a Milano, o un bistrot italiano a Parigi. Mentre il valore di questo primo contatto non deve essere sottovalutato, esso trasmette un'immagine commerciale e stereotipata della conoscenza gastronomica. Solo attraverso il contatto diretto con il paese il processo inizia realmente. Come d'altronde avviene per la conoscenza di una lingua che è tale solo quando la si "esercita" nel paese che l'ha prodotta. Ma perché questo sia possibile è necessaria tutta una panoplia di strumenti, informazione ed esperienza, di cui i seguenti sono solo alcuni:

- Carte geo-gastronomiche che, al pari di quelle geografiche che un viaggiatore porta con se, forniscano la base sulla quale un turista/consumatore può fare scelte identificando le peculiarità e le specialità di un determinato luogo.
- Itinerari illustrati e commentati che permettono al viaggiatore di visitare luoghi di produzione di qualità siti di produzione di qualità e di fermarsi in piccoli ristoranti che servono cucina locale. Accanto alle visite ai monumenti, si dovrebbero fornire informazioni o itinerari per esplorare il patrimonio culinario.
- Degustazioni di prodotti che possono essere organizzate da produttori, ristoratori o ogni viaggiatore dovrebbe essere informato degli eventi culturali e/o culinari, così come sono incoraggiati a visitare le mostre. In Italia, fiere, mercati, carnevali e le feste dei santi patroni sono fonti di conoscenza inestimabile.
- Visite guidate di siti prestigiosi o importanti per la cultura culinaria di un paese.
- Contatto con le associazioni locali che promuovono le specialità locali e incoraggiano la cultura gastronomica.

In questo modo, un luogo, una città, rappresentano una sorta di museo contemporaneo del mangiare, dove il contatto diretto con la cultura autoctona favorisce un'ampia conoscenza non solo geografica ma anche sensoriale e storica dell'offerta culinaria di un territorio. Ciò che il turista acquisisce sul posto e porta via con sé, lo spingerà a rinnovare l'esperienza.

Sistemi di conoscenza nel turismo gastronomico

Nel corso dei secoli, i turisti hanno viaggiato per imparare le lingue e i modi di vita di altre persone e il turismo gastronomico è un'estensione di questo processo di apprendimento. attraverso il quale si formano i ricordi e si viene iniziati ad un sistema di conoscenza. Il viaggio

diventa interessante quando le persone iniziano a confrontare le esperienze alimentari e sono capaci di formulare domande e giudizi. Il culmine di questo processo di apprendimento è un nuovo itinerario incentrato sulla gastronomia.

Per molti italiani, il turismo gastronomico iniziò con le zone più povere e poco costose del paese, viaggiando avanti e indietro tra zone del nord, del centro e del sud. Oggi, i tour gastronomici, con tanto di lezioni di cucina e degustazioni, sono una specializzazione dell'industria turistica nel suo insieme.

Quando si promuove il cibo, è importante abbracciare esperienze che richiamino l'impatto, la diversità e l'unicità del paese ospitante. Le esperienze alimentari stanno prendendo il loro posto accanto ad altre esperienze incentrate su aspetti della vita quotidiana. Lo scopo è tanto quello di condividere oggetti o esperienze quanto quello di trattare il corpo o l'esperienza come qualcosa di più grande del semplice comfort. Come forma di turismo del benessere, il turismo gastronomico ha il vantaggio di procurare godimenti sconosciuti attraverso i sensi, familiarizzare con gli altri e creare e rinnovare i ricordi in un regno che è quotidiano ed esotico. Poiché i suoi principi di base sono universali, cioè la produzione e il consumo di cibo, un numero crescente di paesi ha scelto la gastronomia come un segno distintivo di eccellenza. Allo stesso tempo, i viaggiatori sono sempre più consapevoli o determinati ad assaporare la cultura gastronomica delle loro destinazioni di vacanza. Il turismo gastronomico ha inoltre il vantaggio che anche senza conoscenza della lingua, il cibo e le bevande possono offrire un acclimatazione e naturalizzazione del turista.

Modelli culinari in gastronomia

Nonostante la globalizzazione culturale, esistono ancora modelli culinari nazionali, che richiedono prodotti, tecniche, forme e utensili speciali.

La cultura di una città può essere allo stesso tempo asiatica e latino americana o italiana e regionale ma è comunque vero che ogni comunità offre il proprio accesso personale alle tradizioni alimentari. È per questa ragione che i modelli culinari che sono sia localizzati e trasponibili altrove, come il modello italiano, sono così importanti.

Sebbene sia composto da un gran numero di varianti locali, appare sufficientemente uniforme agli occhi degli stranieri. Un dato piatto locale, sconosciuto alla maggioranza degli italiani, può essere messo alla ribalta grazie al successo di uno dei suoi ingredienti da parte di un abile ristoratore, o da agenti di viaggio che si concentrano su una determinata regione. Per esempio, la cipolla rossa di Tropea o la 'nduja di Spilinga di Calabria al pari del lardo di Colonnata o della pizza napoletana, hanno fornito un alto valore gastronomico a piatti elaborati da alcuni ristoratori o chef stellati.

Man mano che la cucina italiana si diffonde, sparsa per migliaia di chilometri, i vincoli a cui è soggetta diventano meno restrittivi: gli ingredienti che hanno viaggiato lontano o sono stati imitati offrono sapori che sono generalmente adattati ai gusti del paese (straniero) ospitante. Pertanto i turisti si avvicinano generalmente a un paese attraverso una versione adattata e annacquata della sua cucina. La verità è che molti piatti della cucina italiana, come serviti quotidianamente nelle famiglie, comportano un'estrema semplicità di ingredienti e tecniche. La semplicità nella ricetta non significa necessariamente che un piatto non abbia storia: dietro un piatto di pasta o un brasato ci sono secoli di cucina popolare, come evidenziano numerose testimonianze delle tradizioni culinarie regionali.

Un modello esiste nella sua versione purista e nella sua versione adattata, quest'ultima viene replicato altrove. Questo pone un problema di approccio e di autenticità. Inoltre, la maggior parte dei visitatori non si preoccupa degli standard di produzione e le mappe dei prodotti locali, dato che raramente è quello che sperimentano in un ristorante di città.

Imporre un modello di autenticità non deve essere un compito ingrato. Ma il problema per i turisti è che generalmente sanno poco del cibo che viene loro servito, per cui richiedono informazioni prima della partenza, durante il viaggio e a tavola.

Se ogni paese ha le sue piccole e grandi cerimonie, tutte meritano di essere sfruttate. Il cibo è uno dei costrutti culturali che connota in maniera pregnante e riconoscibile una comunità.

Ecco perché non conoscendo praticamente nulla di questo aspetto della cultura di un Paese, i turisti non riescono ad apprezzare adeguatamente la sua storia.

Si dovrebbe, quindi, spiegare a un turista straniero in Italia, al pari dell'arte o della musica, il ruolo speciale che ad esempio ha lo zucchero nella civiltà rinascimentale, o quello ininterrotto del pomodoro.

Insegnare ai turisti i modelli gastronomici e la sua storia, non solo conferisce importanza culturale al loro status di viaggiatori, ma ne stuzzica l'appetito culturale. Parlare di cucina è un preludio al consumo di un piatto o alla degustazione di un vino.

In questo processo l'ostacolo della lingua rappresenta un punto nodale per il turista che per necessità ricorre alla traduzione di ogni piatto e bevanda in termini forniti dalla propria cultura. Ecco perché esibire un gusto semplice e una volontà di provare tutto è una qualità riconosciuta che si riflette nelle parole e nei piatti passati da una lingua all'altra.

È infatti la narrazione in una lingua, la presentazione di un piatto, il significato di un alimento o l'ingrediente che lo caratterizza a determinare l'esperienza di condivisione. Potremmo essere tentati di aggiungere che il cibo deve essere digerito, anche da un punto di vista culturale.

Conclusioni

L'importanza di saper interpretare la gastronomia merita un'ulteriore riflessione.

Il patrimonio culturale immateriale della gastronomia si differenzia da quello dei siti e dei monumenti tradizionali in quanto si evolve e si sviluppa insieme alla rispettiva cultura. Dobbiamo quindi tenere conto dell'emergere di nuove culture e tradizioni e riconoscere la tradizione gastronomica come un processo in continua evoluzione. Il turismo gastronomico non è quindi solo una questione di conservazione del passato, ma anche di mantenimento dell'autenticità nel futuro.

Le varie cucine del mondo esigono una comprensione distinta e immediata di certi sapori dominanti. L'abbinamento dei vari piatti, le procedure di assemblaggio e di consumo e la scelta dell'ordine in cui assaggiare i cibi presentati, costituisce un esercizio molto interessante e piacevole. La storia stessa gioca un ruolo rassicurante.

Questo non significa che ci si siederà a tavola con un dizionario a portata di mano.

Anche perché un turista italiano sarebbe incapace di paragonare la granita al limone di Messina a qualsiasi bevanda servita in altre regioni. Questo perché la granita, condita con panna montata, o nella quale intingere la brioche, ad inizio giornata, richiede comprensione e, nel contempo, lettura della cultura che l'ha prodotta.

Va da se che lo sviluppo della produzione, del consumo e della gastronomia nella promozione del turismo richiede il rispetto di alcune regole. Queste regole consistono nel mettere in evidenza il territorio di produzione locale, i suoi prodotti di eccellenza ed il loro pieno godimento da parte del turista.

Per prima cosa un'efficace comunicazione sulle zone di produzione locale e i loro prodotti. Di seguito un prodotto di qualità ha bisogno di essere assaggiato e consumato per essere quindi memorizzato e successivamente riconosciuto nella sua etichetta.

Infine, tali prodotti e le zone in cui sono prodotti devono essere presentati ai visitatori in modo che possano conoscerli e apprezzarli entrambi, cosi come il legame che li unisce. In tal modo il turista assocerà il prodotto non solo al suo stretto valore "alimentare", ma anche a una comunità.

Inoltre il turismo gastronomico non dovrebbe risentire della stagionalità dato che si sviluppa lungo tutto il corso dell'anno.

Solo questa sorta di educazione agli alimenti permetterà di assegnare quel valore culturale, sensoriale e culinario che merita.

L'apprendimento e, nel contempo, l'abilità da parte dei ristoratori consapevoli e preparati permetteranno di fornire anche una sorta di assistenza didattica adeguata al turista, il quale, insieme a degustazioni di cibo, riscoprirà questa risorsa culturale inestimabile, invitandolo a reiterare le visite.

La sfida per i professionisti consiste nell'utilizzare in modo efficace le iniziative pubblico-private per innovare in modo efficace al fine di adattarsi e quindi soddisfare le esigenze del nuovo consumatore culturale.

Il concentrarsi sulla capacità di discernimento dei clienti, alle competenze degli operatori e adattarli alle variabili locali e alle opzioni di viaggio è, per il turismo enogastronomico, una priorità e, nel contempo, la chiave del successo.

Riferimenti bibliografici

Alvarez, M. (2002) "La cocina como patrimônio (in)tangible". In: Maronese, I. (ed.) *Primeras jornadas de patrimonio gastronômico*. CPPHC-CABA, Buenos Aires.

Boniface, P. (2003), *Tasting Tourism*, Ashgate Publishing Ltd, Farnham.

Barthes, R. (2013) "Toward a psychosociology of contemporary food consumption in Counihan" , C. e Van Esterik, P. (a cura di), *Food and culture: a reader*, London, Routledge, pp. 28-35.

Corvo P. (2009) "Reinvenzione del cibo e sviluppo del territorio: il turismo enogastronomico" in *Culture della sostenibilità*, pp 90-101

Croce, E. and G. Perri (2010), "Food and wine tourism integrating food", in *Travel and Territory*, CAB-International, Wallingford, UK - Cambridge, United States.

Guidoni A.(2019), *Foodie con la valigia. Il turismo enogastronomico in Italia*, Aracne, Roma

Herzfeld, M. (2010). "Essentialism". In A. Barnard & J. Spencer (Eds.), *Encyclopedia of social and cultural anthropology*. Second Edition (2002 ed.). London: Routledge.

Lewis S.L., Maslin M.A. (2019), *Il pianeta umano*. Einaudi: Torino.

Lévi-Strauss, C. (2010), *Le origini delle buone maniere a tavola*, Milano, Il saggiatore.

Petrini, C. (2010), "Terra Madre", *Forging a New Global Network of Sustainable Food Communication*, Chelsea Green Publishing Company.

Pitte, J.R. (2002) *French Gastronomy*. Columbia University, New York.

Richards, G. (2002) "Gastronomy: an essential ingredient in tourism production and consumption?", in: Hjalager, A. - M. and Richards, G. (eds) *Tourism and Gastronomy*. Routledge, London and New York, pp. 3–20.

Sahlins, M. (2011), *La lanterna dell'antropologo*. Edizioni Medusa: Milano.

ISBN: 978-2-931089-30-9

The food, cuisine and gastronomy, an important aspect of tourism in Albania

Majlinda LICI KOCI*
Lecturer - Albania

Abstract: Albania is one of the countries that has a significant tourist potential by promoting different types of tourism. One of these types of tourism is the culinary tourism, which has attracted the attention of many tourists. The gastronomy and culinary tourism is a new trend that has long appeared in the tourism sector. All over the world, the tourists travel just to try new and unique flavors that they can't find anywhere else except in the country that offers them, natural foods, not genetically modified and without chemicals. Albania is exactly the right place to offer delicious, natural food, grown in home or in the small farms, bringing back to life the old recipes that clearly identify each area. Albania is moving towards a more competitive culinary tourism oriented towards the market, aiming to provide a better quality service by promoting unique products, foods and traditional dishes.
The purpose of this paper is to explore the conditions in which the culinary tourism has been established in Albania, the types of cooking and traditional dishes. In this paper, we will highlight the diversity of food and the basic food products that are produced and consumed in our country. The food and cuisine of one city is not repeated in another city and a tourist's journey is made more beautiful by tasting different foods in different places.
Of course, in this paper it will not be left without analyzing the problems that are noticed in the culinary tourism, as well as the ways and ideas for the further improvement. The traditional recipes based on organic products from different areas of Albania will also be reflected.
For the realization of this work was used the descriptive and analysis method. The qualitative data were examined, consulted and interpreted to highlight the issues related to the development of culinary tourism, using of bibliographies, studies and articles of Albanian and foreign researchers, as well as through the observation instrument.

Keywords: Culinary tourism, food, gastronomy, traditional cuisine, problems, improvement.

Albanian food, cuisine and gastronomy

In recent years, food has a special importance in the Albanian tourism industry, due to the potential to differentiate tourist destinations as part of the tourist product. Food is gradually becoming an important part of Albanian culture, part of intangible cultural heritage and increasingly an important attraction for tourists. Appreciating the ever-increasing importance of cultural heritage, managers and planners of tourist destinations are faced with the challenge of providing new experiences that include atmosphere, creativity and lifestyle.

The need to eat is the same for all of us, but it also differentiates us. Gastronomy tourism has arisen precisely because of this difference: the difference between tourists who simply feed

* Corresponding Author: maj.li@yahoo.it

themselves during their travels and those for whom gastronomy has a decisive influence on their choice of destination and who wish to satisfy their hedonistic and cultural appetite in addition to their physiological need to eat.[1]

The increase of intangible heritage role represents the tendency of tourists towards the unique and more valuable experiences. This is a challenge for tourism operators, to create more and more special products. So this tourism development linked to gastronomy requires new ideas, new initiatives and, sometimes, new concepts.[2]

From the tourist point of view, food takes on a different meaning, it does not simply have a vital role but gastronomic tourists are looking for authenticity and distinctiveness, they are looking for local experiences, as they consider food as an important way of presenting the culture of the host destination . Culinary today has turned into a tourist product that needs to be promoted.

Albania is one of the most ancient countries of Europe and there are tracks of both oriental and western cultures and culinary art. Turkish, Balkan, and Mediterranean kitchens have had a significant influence on Albanian cuisine, which has become known for highly nutritional and delicious food.[3] Albanian cuisine is a mixture of Turkish, Balkan and European cuisine. It is known for its high nutritional value and good taste. The Albanian cooking tradition is rich in mystical flavors and aromas, after which many who have tried them, have remained fascinated. Almost every province offers its own special specialties.[4]

At first, we must say a few words about some foods that still, in our days, in many areas of the country, people find ready in nature and usually consumes them as they are. It is about grains, leaves, seeds, tubers, mushrooms and other parts of plants that can be eaten. Their consumption is usually done by local residents, who know the local vegetation well and who know how to distinguish which can be eaten and which can't, because they can be poisonous. These plants generally grow in uncultivated soils. We can mention, for example, blackberries and mulberries, jujubes and many other wild trees, as well as the honey of wild bees. This group would also include a range of herbs, such as nettles, radishes, sorrel, etc., which were simply boiled in salted water. We could also include here many of the aromatic plants as: oregano, parsley, mender (mint and spearmint), bay leaves, basil, celery, rosemary,which were added to other dishes for taste.[5]

Some traditional food

The main food item was bread. According to the testimony of the relators of c. XVII, in the highlands of Albania, food was generally poor, few in quantity and monotonous in variety. In the long winters of these areas, bread was often missing or not enough for the whole year, because the cultivated land was scarce.

The use of corn bread is undoubtedly related to the spread of this agricultural crop in Albania. The traces so far have shown that in a document from 1622, it is mentioned as a new culture with the name Kalamboq (Jorgo Turco).[6]

[1] World Tourism Organization (UNWTO) and its affiliate member, the Basque Culinary Center, "Guidelines for the Development of Gastronomy Tourism", https://www.e-unwto.org/doi/pdf/10.18111/9789284420957, (accessed 10 October 2022).

[2] M. F. Xavier , María del Pilar Leal and José A. Vázquez-Medina, "Tourism and Gastronomy:An Introduction", https://journals.openedition.org/aof/8448, (accessed 20 October 2022).

[3] FOOD & DRINK: Feel the taste, https://feel-albania.com/portfolio/food-drink/, (accessed 20 October 2022).

[4] HTTPS://TURIZMI.GOV.AL/TURIZMI-AT-A-GLANCE

[5] F. Peter, Medicinal & Aromatic Plants (MAPs): Sector in Albania Market Assessment, https://pdf.usaid.gov/pdf_docs/PA00M2NP.pdf, (accessed 20 October 2022).

[6] HTTPS://WWW.ORGANICALBANIA.AL/INDEX.PHP/SQ/, (ACCESSED 20 OCTOBER 2022).

In addition to the poor areas, there were also many other more developed areas, where peasant women cooked very good bread, of different types, either with wheat flour or mixed with corn flour. Baking was done in different ways, with saç or in special bread ovens, which were common in rural dwellings. If necessary, as a simple bun, the bread could be baked directly on the hearth, covered with ashes and embers.

For weddings, special bread was baked in a pan, in the dough of which a little chickpea flour was added, which gave it a special taste and made it more crumbly: then this was decorated with flowers and painted with eggs, which to brown during baking. In the same way, a chosen bread with many decorations was the "bride's bun" etc. Others types of bread were for occasions of death or memorial days for the dead. Different types of cookies were made for holidays and rites of the weather, for example for Midsummer's Day or the bread that the farmer took to the field on the day that the planting of the season would begin.[7]

Coarsely ground wheat was also used to prepare trahanaja and semolina, which are explicitly mentioned in a document from 1689, but which, without a doubt, are earlier. Many other dishes were also prepared based on flour, such as: mullet, various porridges, a very wide variety of pancakes, then noodles, dromezat, etc. An important place in the food of the village, especially during the summer season, was occupied by lakrori (a dish with two noodles between which lay a dish of greens), djathaniki, pispili with corn flour, etc., which were baked with saç in a pan. [8]

In the village, after bread, the most important dairy food item which was consumed in different ways was milk, which was mainly used for breakfast.Butter, melted and salted, was stored well in special wooden containers and was used for all kinds of cooking, especially in areas where olives did not grow. Different regions of the country produced different types of cheeses with characteristic flavors, some fatter, some less so. Among the best traditional cheeses of the country were: the white cheese of Gjirokastra, the cheese of Gorë-Opar (Korça region), the cheese of Dibra, the cheese of Kelmendi (Shkodra region), etc.[9] During the summer season, yogurt and buttermilk, as well as yogurt sauce, were preferred for general consumption.

Meat in the village was consumed more during the winter months. By the end of autumn, most families slaughtered a calf or a sheep. They kept the meat salted to consume it gradually. Christian families, in December, usually slaughtered a specially fattened pig.On the occasion of family holidays or any feast, they slaughtered a lamb, but usually not before the feast of St. George (April 23), because before this date the lambs were still very small. During the year, from time to time they could slaughter a chicken, especially when a friend came.

Villagers in the interior mountainous areas consumed little fish, usually dried ciron and eel. Christians used fish especially during Lent. It is understood that more fish was eaten in coastal areas and in areas near lakes. Thus, the trout of Pogradec Lake were famous; sea bream, carp, sardines and putargas of Shkodra.[10]

Baked Crepes (Flija)

It is a typical Albanian dish, especially from the northern areas of Albania. Its cooking is a process that engages the whole family. It is considered a dish that symbolizes the difficulties of life but also its beauty and taste.[11]

[7]Summer Day, a special celebration in Albania, https://www.amfora.al/en/summer-day-a-special-celebration-in-albania, (accessed 9 October 2022)

[8]Pispili with corn flour, https://gjirokastraonline.com/kuzhina-gjirokastrite/pispili-tradicionale-me-miell-misri/, (accessed 9 October 2022)

[9] Understanding The People And Food, https://www.visit-gjirokastra.com/knowing-people-and-food/, (accessed 9 October 2022)

[10]Tre peshqit e ujrave shqiptare, receta dhe tradita, https://albanian.cri.cn/culture/more/3104/20210805/693619.html , (accessed 9 October 2022).

[11] Flija, https://www.tasteatlas.com/flija, (accessed 11 October 2022).

Riceballs (Qifqitë)
They are traditional cooking of the city of Gjirokastra. They are meatballs with moist spices and boiled rice. The characteristic spice is mint as we call it in the south or dhjozma. Earlier, they were fried in special pans which over time are no longer found.[12]

Albanian fried food of cheese or curds (Fërgesa)
Fërgesa is a typical recipe of central Albania. This dish is cooked in many ways, such as with cottage cheese and peppers, peppers and chicken or lamb liver, but this recipe of fried cottage cheese and eggs is also very tasty and economical.[13]

Lakrori
It is the most unique tradition, undoubtedly more than just a taste for Albanians, but mostly for foreign tourists, who have left their minds behind it. The lakrori, known as the tradition of Korça is baked in saç. Lakrors can be combined with a variety of products, lakror with cheese and milk, with onion and tomato, with spinach or with leeks, but the village lakror with wild cabbage is the most wonderful of all. It has only a unique taste with high values of wild cabbages.

Imam Bajalldi
It is another Albanian dish of Turkish origin. Having been occupied by the Ottoman Empire for centuries, various Albanian recipes originate from Turkey. "Imam Bajalldi" is the perfect summer dish. It is made of large stuffed eggplants cooked in the oven. Similarly, there are many variations of the recipe, therefore, the fillings may vary. Most versions include garlic, tomato puree, onions, and parsley.

Baked Lamb or Chicken in Yoghurt (Tava e kosit)
Otherwise known as the Elbasan casserole, it is part of the rich Albanian cuisine. It is made with lamb legs marinated in yogurt. [14] This casserole became famous in the Ottoman Empire because it was liked by Mehmet II, who tried it during the campaign to take Kruja in 1452.

Small pieces of grain or corn bread (Pershesh)
The area of Myzeqe is mentioned for breeding the turkeys, consequently it is recognized for the preparation of the turkey with pershesh (small pieces of grain or corn bread). This traditional specialty is prepared throughout the country but it is more delicious in this area, where all the guests might enjoy the restaurants.

Mirdita
If there is a small culinary culture in Mirdita, this is thanks to the Franciscan friars who brought to this area not only knowledge and culture, but also their cooking tradition. Pork remains the main food and the basis of many of the recipes that are cooked in the Mirdita. Every Christmas Eve, the mirditors prepare a pork dinner where all the recipes are prepared that have everything from the pig as the main basis, even its blood.

In Mirdita, it is a tradition to cook cabbage with blood, pig's brains and melted fat or, as it is called in the Mirdita dialect, zhikrra.

[12] Qifqi, https://www.tasteatlas.com/qifqi, (accessed 11 October 2022).
[13] Fergese: the recipe of the typical dish that brings Albania to the table, https://musa.news/en/fergese-la-ricetta-del-piatto-tipico-che-porta-lalbania-a-tavola/,(accessed 11 October 2022).
[14] Albanian foods that survived time, https://smapse.com/albanian-cuisine-most-delicious-dishes/,(accessed 11 October 2022).

Tirana
stands out for the chicken with porridge, the pilaf with turkey or the tirana fërgesë, a summer stew consisting of a rich tomato sauce, cottage cheese, peppers and garlic.[15]

There are also the variety of the desserts. The desserts with milk, creams, fruit juices, the desserts with sherbet (baklava, sheqepare, kadaif), hashuret, syltiash, etc. are used. Among the traditional dessert is ballokume which are typical of Elbasan. They are prepared by the local housewives professionally on the celebration of Summer Day (14th March), but even on the events of family.

Ashure is a traditional Albanian dessert that originated from Turkey. It has a gelatin consistency that melts in your mouth, giving you the chance to taste the nuts or dry fruit that it is made with. It can best be described as a sweet porridge that is served cold. It is a popular Albanian dessert that is traditionally eaten during the first month of the Islamic calendar.[16]

Also the preparation of glikos in this region according to the type of the fruits is the tradition of the population in Permet. Among the most special ones is the gliko of nuts.

Raki is a very popular local alcoholic beverage. Although **raki** was imported from Turkish cuisine, it remains a widely preferred beverage amongst Albanians. A very popular is the one produced in the artisanal way from the vineyards in the area of Skrapar and Permet at the southern part of the country. Furthermore, the production of raki from the mulberry is a characteristic for this zone (Erseke, Leskovik).

The tradition of the production of raki, wine, according to the variety of the grape produced in Narta, Skrapar, Permet, Himara, Leskovik, Kelcyre, Pogradec, Delvina is a characteristic for this region.

Viniculture and wine production have a very old tradition. The art of wine processing in our country has been popular since antiquity. Among the red wines, we can mention: - Shesh i zi (Tiranë Durrës) - Kabërnet and Merlot, (Berat, Lushnje, Përmet, Vlorë etc.), Kallmet (Shkoder Peshkopi), Pino Nero and Mavrud (Leskovik, Shkodër, Lushnje). Among the white wines, the following are mentioned: Shesh i Bardhë (Tirana), Riesling (Durres) etc. Among the alcoholic drinks with colours, we may mention Konjaku Skenderbeg, which has won prizes in international competitions.[17]

Apart from the production of the alcoholic drinks, the production of rehani in Skrapar is very popular and traditional.[18]

Among the non-alcoholic drinks, it is worth mentioning boza (a soft drink based on corn), produced in the north of the country, especially in the province of Kukës.[19]

Tirana nowadays

From the frequency of Italian terms on Tirana's restaurant signs, you will immediately understand that our friends from across the sea are the undisputed champions of foreign restaurants. Until a few years ago, Italian chefs were also very fashionable. Even now you hear restaurant owners confidently and proudly declaring that they had Italian chefs. This type of advertising

[15] Albanian Gastronomy, https://albania.al/wp-content/uploads/2019/08/culinary-english.pdf, (accessed 11 October 2022).
[16] Albanian Gastronomy, ibidem.
[17] History of Cantina, https://konjakskenderbeu.al/?fq=shqip&art=historiku&k=kemba&gj=en, (accessed 14 October 2022).
[18]Corovoda,tourism with history,legends,canyons, http://www.hoteleriturizemalbania.al/2014/10/reporta-zhcorovoda-turizem-me-histori.html, (accessed 14 October 2022).
[19] Kukes-Festival of Boza, https://smilealbania.gov.al/kukes-festa-e-bozes/, (accessed 14 October 2022).

has long lost its luster. The young Albanians proved that they learn quickly and did not delay to take their place for the newcomers. The Italians are followed by the Turks, who dominate the field of sweets, and by the Greeks, who have a significant presence in some restaurants of Tirana with Mediterranean dishes.[20]

Also, the "giants" of the far east have not hesitated to appear in the city center. There are at least 2-3 Chinese and Japanese restaurants that are making serious and sometimes successful efforts to bring the Albanian public closer to the flavors that are new to the restaurants of this area.

In order to promote and give a greater boost to tourism in general and culinary tourism in particular, projects have been drawn up by the national tourism agency. One of these projects is called "My fantastic Albania". It is a project which aims to bring to the attention of the Albanian reader every week destinations and tourist attractions that are worth visiting throughout 2014. This supplement will take readers to every corner of the country to make him know elements of the cuisine, cultural heritage, hospitality and handicrafts that particular areas have to offer."[21]

As a conclusion, Albania is one of the countries that has a significant tourist potential by promoting different types of tourism. One of these types of tourism is the culinary tourism, which has attracted the attention of many tourists. The gastronomy and culinary tourism is a new trend that has long appeared in the tourism sector. Albania is exactly the right place to offer delicious, natural food, grown in home or in the small farms, bringing back to life the old recipes that clearly identify each area. Albania is moving towards a more competitive culinary tourism oriented towards the market, aiming to provide a better quality service by promoting unique products, foods and traditional dishes.

BIBLIOGRAPHY

I. Monography and papers

- Ajeti, I. Some popular Albanian names of dishes and food from a linguistic point of view", Prishtine, 1990
- Gjergji.A. Lecture on Albanian ethnology, Tirane:, EXTRA, 2001
- Ricards, G. and Raymond, C. “Creative tourism”, *ACADEMIA*, ATLAS News, 2000, https://www.academia.edu/1785786/ Creative_Tourism_Richards_and_Raymond_2000, (accessed 11 October 2022)

II. Online articles

- Albanian foods that survived time, https://smapse.com/albanian-cuisine-most-delicious-dishes/,(accessed 11 October 2022).
- Albanian Gastronomy, https://albania.al/wp-content/uploads/2019/08/culinary-english.pdf, (accessed 11 October 2022).
- FOOD & DRINK: Feel the taste, https://feel-albania.com/portfolio/food-drink/, (accessed 20 October 2022).
- F. Peter, Medicinal & Aromatic Plants (MAPs): Sector in Albania Market Assessment, https://pdf.usaid.gov/pdf_docs/PA00M2NP.pdf, (accessed 20 October 2022).
- Fergese: the recipe of the typical dish that brings Albania to the table, https://musa.news/en/fergese-la-ricetta-del-piatto-tipico-che-porta-lalbania-a-tavola/,(accessed 11 October 2022).

[20] Top 6 restaurants in Tirana, http://www.visit-tirana.com/news/view/127/Top_6_restaurants_in_Tirana, (accessed 20 October 2022).

[21] HTTPS://ALBANIA.AL/

- Flija, https://www.tasteatlas.com/flija, (accessed 11 October 2022)
- History of Cantina, https://konjakskenderbeu.al/fq=shqip&art=historik u&k=kemba&gj=en, , (accessed 14 October 2022).
- https://turizmi.gov.al/turizmi-at-a-glance/
- https://businessmag.al/kulinaria-trendi-me-i-ri-i-turizmit-ne-shqiperi/
- https://turizmi.gov.al/ëp-content/uploads/2019/06/Strategjia-Komb%C3%ABtare-e-Turizmit-2019-2023.pdf
- https://www.shoqata-alpin.al/?p=15717
- https://abcnews.al/die-w elt-artikull-per-turizmin-kulinar-ne-shqiperi/
- https://turizmi.gov.al/turizmi-at-a-glance/
- https://businessmag.al/kulinaria-trendi-me-i-ri-i-turizmit-ne-shqiperi/
- https://turizmi.gov.al/wp-content/uploads/2019/06/Strategjia-Komb%C3%ABtare-e-Turizmit-2019-2023.pdf
- https://www.shoqata-alpin.al/?p=15717
- https://abcnews.al/die-w elt-artikull-per-turizmin-kulinar-ne-shqiperi/
- https://www.organicalbania.al/index.php/sq/, (ACCESSED 20 OCTOBER 2022).
- Kukes-Festival of Boza, https://smilealbania.gov.al/kukes-festa-e-bozes/, (accessed 14 October 2022).
- M. F. Xavier , María del Pilar Leal and José A. Vázquez-Medina, "Tourism and Gastronomy:An Introduction", https://journals.openedition.org/aof/8448, (accessed 20 October 2022).
- Pispili with corn flour, https://gjirokastraonline.com/kuzhina-gjirokastrite/pispili-tradicionale-me-miell-misri/, (accessed 9 October 2022)
- Qifqi, https://www.tasteatlas.com/qifqi, (accessed 11 October 2022).
- https://turizmi.gov.al/turizmi-at-a-glance
- Summer Day, a special celebration in Albania, https://www.amfora.al/en/summer-day-a-special-celebration-in-albania, (accessed 9 October 2022)
- Top 6 restaurants in Tirana, http://www.visittirana.com/news/view/127/Top_6_restaurants_in_Tirana, (accessed 20 October 2022).
- Understanding The People And Food, https://www.visit-gjirokastra.com/knowing-people-and-food/, (accessed 9 October 2022)
- World Tourism Organization (UNWTO) and its affiliate member, the Basque Culinary Center, "Guidelines for the Development of Gastronomy Tourism", https://www.e-unwto.org/doi/pdf/10.18111/9789284420957, (accessed 10 October 2022).

III. Law

- Law no. 93/2015 "On tourism"
- Law no. 27/2018 "On cultural heritage and museums"
- National Strategy for Sustainable Tourism Development 2019-2023 (Ministry of Tourism and Environment, 2018).

ISBN: 978-2-931089-30-9

Sustainable Eating in Times of Crisis: between locavorism, ecologism, and safetyism

Maria Giovanna ONORATI*
Pollenzo University of Gastronomic Sciences (Bra) - Italy

Francesco Domenico D'OVIDIO
University of Bari "Aldo Moro" - Italy

Elena HORSKÁ
Slovak University of Agriculture in Nitra - Slovensko

Abstract: The commodity crisis, triggered first by the pandemic and then by the war in Ukraine, is accelerating the deglobalization of food supply and consumption and promoting interest in "eating local". The success of locavorism is twofold, however, as it expresses the delicate tension between a forward-looking ecological sensibility and a backward-looking, revitalising nationalism (Onorati and d'Ovidio, 2022). On the one hand, locavorism overlaps with calls for sustainable food, such as short supply chains, reducing miles, and the farm-to-table strategy pursued at the European level (Horská et al. 2021). On the other hand, the emphasis on the local lends itself to aestheticization to the point of fetishizing the origin of products, as well as ideological claims about identity and banal nationalism (Reich et al. 2018; DeSaucey, 2010; Billig, 1995). The issue of local food thus highlights potential shifts from sustainability politics to identity politics.
To better understand these trends, this paper will present the results of a panel survey conducted among a global sample of consumers on sustainable food habits since the beginning of COVID -19. In particular, the data show an increasing preference for local food, which is accompanied by a growing reliance on local food and made-in-Italy food as a reflection of safety concerns, especially in troubled times. The research also offers insights into the importance of cultural values and vision in restructuring consumer agency in times of transition (Spaargaren et al. 2006).

Keyword: sustainable food; sustainable consumption; locavorism; gastronationalism; from-farm-to-table

1. Introduction

Sustainable eating in times of crisis has become a very complex concept, especially when viewed from the perspective of emerging consumer trends such as locavorim, ecologism, and safetyism. Even when these claims are consistent with a vague notion of sustainability, they are often expressions of a contradictory axiology (Onorati and d'Ovidio 2022), a materialized coincidence of 'is' and 'ought'" (Bourdieu 1984, 339) that is not always compatible with the requirements of sustainable development that gave rise to them.

Since the outbreak of the COVID -19 pandemic, consumer behaviors related to food-namely shopping, cooking, eating, learning about purchases, preparing meals-have changed in several ways (Eftimov et al. 2020). A widespread sense of loss and insecurity affected everyday life, and especially on the consumption side, market research estimates that a new set of values such as frugality, ecology, safety, and health support the "new normal" global trends and increasing agile innovation (Euromonitor 2020; 2021).

* Corresponding Author: m.onorati@unisg.it

The commodity crisis, first triggered by the pandemic that showed the fragility of long-supply chains, and then exacerbated by the war in Ukraine, hit the agricultural commodity markets especially hard, disrupted supply chains, caused a dramatic shortage of commodities around the world and price shock with effects of food security vulnerability (Hellegers 2022)

Global food prices had increased in 2020 and 2021 due to supply shortages caused by adverse weather conditions resulting from climate change and economic shocks following the Covid 19 pandemic and the resulting disruption of global supply chains (Food Security Information Network 2022). In 2022, these trends were exacerbated by Russia's invasion of Ukraine and blockade of significant agricultural exports from that region (FAO 2022). Global food prices are likely to go on rising, threatening people around the world with serious food insecurity and malnutrition (Wesley and Peterson 2022).

Export restrictions to secure local food supply are among the resiliency strategies pursued by many Countries (Ben Hassen and El Bilali 2022), although this will cause a rise of commodity prices at the global level instead of mitigating inflation (Hellegers 2022). These shocks accelerate a process of deglobalization of food supply and consumption and promote an overriding interest in "eating local," a demand that had emerged among consumers even before the pandemic (Onorati and d'Ovidio 2022; Schulp 2015). Reducing the mileage of consumer goods and emphasising concepts such as "local" and "short supply chain" were central to the call for ecological transition, which the outbreak of the pandemic only accelerated.

The United Nations Sustainable Development Goal 12 advocates a transition to a responsible consumption and production model, where responsible means reducing the gap between production and consumption (United Nations 2020). The European Farm-to-Fork strategy, a new, comprehensive approach developed as part of the European Green Deal to show how Europeans view food sustainability, outlines a model for sustainable food that actually means fresh, less processed, and locally produced food (European Union 2020). On a global level, then, the "axiology" of the crisis presents itself as a value system, whose leading principles are ecology, frugality, locality, safety, security, and agile innovation (Euromonitor 2020, 21).

In line with these global trends, this paper presents the results of a study initiated in 2020 to investigate changes in sustainable food consumption in different countries since the outbreak of the pandemic. The goal is to identify a "new normal" culinary ethos in which a preference for local foods, environmental concerns, and a commitment to safety play a critical role

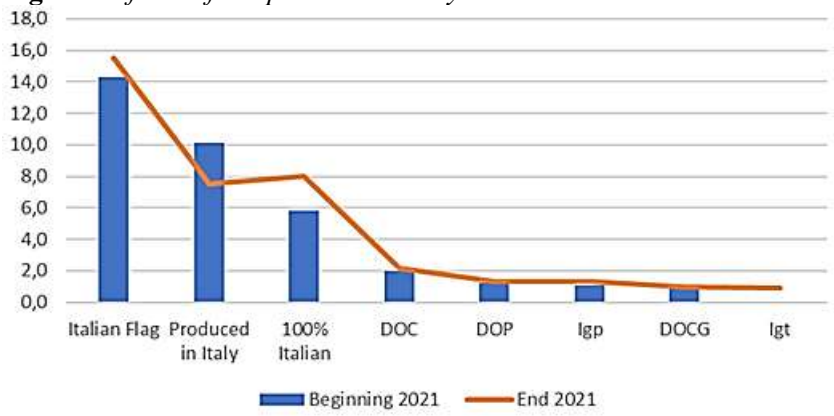
In particular, the analysis provides a first comparison between data collected in Italy and the U.S. to show how different axiological and cultural backgrounds can charge similar consumption patterns with different values and priorities.

2. The “New Normal” Foodscapes in Italy and in the United States

The success of locavorism is a key feature of the ecological plea for shorter supply chains, made both in the name of reduced environmental impact, and reduced dependence on countries that are absolute market players. The reasons for prioritizing locally produced food can then be either universally guided by biospheric concerns, or self-benefically oriented towards more protective approaches to the market. Locavorism is thus a double claim that can express the delicate tension between, on the one hand, a forward-looking ecological sensibility aimed at reducing CO2 emissions through 0km products and preserving health and biodiversity through the use of mainly seasonal and fresh foods, and, on the other hand, a backward-looking ideologization of food that comes with the shift from prioritizing local foods to prioritizing national foods (Reich et al. 2018; Onorati & d'Ovidio 2022). Locavorism overlaps with calls for sustainable food, such as the farm-to-table strategy pursued at the European level (Horská et al. 2021). However, especially in troubled times, when individuals are easily victimized by emotional

rhetoric that exploits a generalized anxiety, the emphasis on the local lends itself to fueling anti-globalist sentiments and fetishizing the origin of products as an ideological simulacrum of identity purity, integrity, and superiority (Parasecoli 2022). The issue of local food, which paves the way for a possible shift from sustainability politics to identity politics, is a crucial point that favors the rise of gastronationalism (DeSaucey 2010; Ichijo 2020), a kind of banal nationalism (Billig 1995) flagging the homeland daily in the plate. This phenomenon is part of a broader process of deglobalization of eating styles that was already visible in consumer behavior in Italy in 2021 (Onorati - d'Ovidio 2022). According to Coldiretti (2021), 7.6% of Italian consumers in 2021 purchased food products with a label indicating a national affiliation, whether a simple three-colour flag on the package or a label stating "Made in Italy" or protected origin. Fig. 1 provides evidence of such a nationalistic understanding of "local" products and shows that between the beginning and end of 2021, the increase is in products with the Italian flag or the label "100% Italian".

Fig. 1. *Preferred food products in Italy in 2021*



Source: our elaboration on *Osservatorio Immagino* 2022.1

In the U.S., the social and economic impact of the pandemic was more immediate than in Italy. By April 2020, the loss of more than 20 million jobs was already imminent. As a result, 2021 was the year of food spending cuts, characterised by a 12.9% decline in household food spending, with FAH and e-wholesale overtaking FAFH, and increasing consumer safety concerns, especially in 2022 (Dhakal et al. 2022).

2022 is the year when safetyism, a system of attitudes and beliefs in which health and safety take on a sacred value (Lukianoff and Haidt 2018) not only entrenches in the American mind, but in times of economic recession, combines with a new demand for affordability and, given the blow to food security from the commodity crisis, even accessibility. Choosing healthier options is no longer just a matter of individual responsibility to make the best possible choice, but also a matter of economic and material accessibility to the best option. In 2021 US represented the 14.2 % of Italian food exports, particularly Made-in-Italy fresh vegetables and organic food export to USA registered an increase of +21% (News Italian Food Net 2022).

The attachment to local products, an attitude that idealizes the link between a product and a place, has a double soul. A green, ecological spirit that proactively appeals to the values of reducing miles, seasonality, and health (expressed through "freshness"); this is the soul of ecological/health locavorism from which food activism emerges (Schulp 2015; Martinez et al. 2010).

When the origin of the product and its connection to a place are emphasized to such an extent that the local becomes synonymous with higher quality, an overtly ideological locavism emerges. This attitude strips local food of any ecological meaning and charges it with either identity claims or origin fetishism. This is the moment when the local becomes part of a normative belief that can make local food a site of resistance to the homogenizing tendencies of globalization, becoming synonymous with national or distinctive higher quality. In Italy, this

phenomenon can take the form of "food patriotism," evident in a preference for products that evoke the nation, or in a lionizing attitude (Reich et al. 2018) that categorizes "one's own food" as higher, safer, and more trustworthy than food that comes from outside (Brown et al. 2003), or it fuels a naïve mythology of food self-sufficiency.

3. The Survey: Sustainable Food Consumption, Local Food and Made-In-Italy Food in "New Normal" Times.

3.1. Research question, sampling and statistical methodology

To investigate these emerging dietary trends and their underlying dimensions, we created a 25-question survey and distributed it in 20 countries from October 2020 to July 2022. This period corresponds to the so-called "new normal" on which an economic "shock" has been grafted.

Tab. 1 – *The survey*

SOCIODEMOGRAPHICS
Q1: Gender
Q2: Age
Q3: Highest Level Of Education Completed
Q4: Current Employment Status
Q5; Marital Status
Q6: Country of Residence
Q7: Importance of Religion in Daily Life
Q8: Importance of Politics in Daily Life
Q9: Diet
Q10: Daily time devoted to cooking
Q26: Yearly Income
WHEN GROCERY SHOPPING SINCE THE PANDEMIC OUTBREAK
Q15: Importance of characteristics when buying food in the last year [Not at all important - Very important]
WHEN GROCERY SHOPPING, YOUR DRIVERS FOR BUYING FOOD
Q19: Frequency of buying "sustainable" food [Never - Always]
Q20: Battery of definitions that best describe your concept of «sustainable food» [Not at all describes - Perfectly describes]
Q20bis: Likely to pay an extra for sustainable food [Not at all likely - Mostly likely]
Q21: Frequency of Buying fresh foods [Never - Always]
Q21bis: Importance of typical reasons for people buying fresh food. It tastes better [Not at all important - Very important] It is healthier for me [Not at all important - Very important] It is healthier for my children [Not at all important - Very important] It contributes to preserve biodiversity [Not at all important - Very important]
Q22: Frequency of Buying local foods
Q22bis: Importance of typical reasons for people buying local food. It tastes better [Not at all important - Very important] It is safer for me [Not at all important - Very important] It is safer for my children [Not at all important - Very important] Supports local businesses [Not at all important - Very important] Reduces the carbon footprint [Not at all important - Very important]
Q23: Frequency of Buying Made-in-Italy food [Never - Always]
Q23bis: Importance of typical reasons for people buying Made-in-Italy food. I trust Made-in-Italy [Not at all important - Very important] It means healthy food [Not at all important - Very important] It means high quality food [Not at all important - Very important] Provides information about origin and supply chain [Not at all important - Very important]
WHEN EATING AT HOME
Q24: Frequency of Eating Made-in-Italy food at home [Never - Always]
Q25: Willing to pay an extra for a Made-in-Italy food product [Not at all likely - Mostly likely]

In this paper, we will present only the results from the Italian and U.S. samples. The overarching research question was, "How has sustainable food consumption changed since the pandemic outbreak?". This question included a sub-question on how "Made in Italy" food consumption has changed in times of pandemics and what values and what feelings drive this change in times of crisis. The data refer to 2,897 valid cases from Italy and 826 from the United States.

Samples were generated using the snowballing technique. Snowballing is a nonprobability, respondent-driven sampling method that uses people's social connections to recruit respondents following a multistage selection process designed by the researcher (Goodman 1961). An initial core of respondents are asked to pass the survey on to their contacts with characteristics as much as possible different from the initial sample. In this research, initial respondents were selected by involving international students and using university mailing lists, taking care to include not only students and faculty, but also different types of stakeholders. This allowed to diversify the sample in terms of geographical distribution, age and income, but introduced bias with regard to gender and education.

The resulting sample is self-forming, its size couldn't be estimated in advance, and, even if it reaches a large number of respondents, it is affected by over-representation of certain groups, especially people who are more likely to cooperate or belong to the circles of recruiters with extended personal networks.

The over-representation of women compared to men in both countries is mainly due to the participation criteria, which requires the survey to be completed by the person who takes care of the food at home. This filter reflects the gender gap that still exists in Italian families, where 80.9% of women are responsible for cooking and housework (EIGE 2020), as well as in the United States, where 80% of women (with children) and 75% (without children) are still the usual meal preparers at home (Pew Reseach Center 2019). This confirms how data obtained through a snowballing process, although not probabilistic, can provide statistical inferences about various aspects of relationships in the population (Goodman 1961, 148). This is also the reason why snowball systems are used for exploratory rather than confirmatory analyses, unless strategies are introduced to post-stratify the data.

Tab. 2 – *The characteristics of the two samples*

Italy						
Gender	**M** 21.8%	**F** 78.0%	**Other/Prefer not to say** 0.2%			
Generation	**GenZ (18-26):** 49.0%	**Millennials (26-41):** 35.0%	**Xgen (42-57):** 10.0%	**Baby Boomers and Olders (58+):** 6.0%		
Education	**Less than high school:** 4.9%	**High school graduate:** 33.6%	**Bachelor / Post-high school:** 31.8%	**Master/Graduate Degree:** 28.6%	**Doctorate:** 1.0%	
Yearly income	**Less than 8.750€:** 17.1%	**€8.751 - €26.250:** 29.8%	**€26.251 - €43.750:** 16.8%	**€43.751-€61.250:** 5.4%	**More than €61.251:** 4.5%	**Prefer not to say:** 26.4%
US						
Gender	**M** 23.0%	**F** 76.0%	**Other/Prefer not to say** 1.0%			
Generation	**GenZ (18-26):** 13.0%	**Millennials (26-41):** 42.0%	**Xgen (42-57):** 22.0%	**Baby Boomers and Olders (58+):** 23.0%		
Education	**Less than high school:** 0.6%	**High school graduate:** 9.7%	**Bachelor / Post-high school:** 56.8%	**Master/Graduate Degree:** 27.0%	**Doctorate:** 5.9%	
Yearly income	**Less than 8.750€:** 4.2%	**€8.751 - €26.250:** 7.3%	**€26.251 - €43.750:** 15.0%	**€43.751-€61.250:** 16.8%	**More than €61.251:** 46.5%	**Prefer not to say:** 10.3%

To make the dataset more parsimonious and to identify underlying patterns of values and motivations behind the observed behaviours, we conducted an exploratory factor analysis, separately for the Italian and the American subsamples. For data analysis, we developed an exploratory factorial analysis with backward elimination of the less correlated variables and highly selective criteria (Burnham and Anderson 2002), setting the minimum eigenvalue at 1.0 and the commonality of variables at more than 0.60 (i.e., to remain in the analysis, one variable must be more than 60% related to the set of all others). To determine the best factorial solution, an orthogonal varimax rotation was performed.

Under these criteria, the best solution was a factorial structure with 12 variables and 4 factors (the same for both subsamples, but with different weights) that explained 66% of the total variance for the Italian subsample and 69% of the American subsample (Table 1). The overall Cronbach's alpha is 0.83 for the Italian subsample, and 0.84 for the American subsample, a high value for reliability in applied research (Nunnally 1978).

Tab. 3 – *Factorial Analysis: matrix of the rotated components*

Factors	Observed variables	ITALY	USA
		KMO = 0.798 66% expl. Var.	KMO = 0.789 69% expl. Var.
Benevolent locavorism/safetyism: benevolent (beneficial-to the concrete close others): fresh, local, and organic food are the main concern	FRESH FOOD (reasons for buying): Importance of healthier for my children	F1- 0.851	**F1 – 0.898**
	LOCAL FOOD (reasons for buying): importance of safer for my children	**F1- 0.814**	F1 - 0.796
	ORGANIC FOOD (reasons for buying): importance of healthier for my children	F1 – 0.816	**F1 – 0.865**
'New Normal' responsibility: response to the pandemic, with at the forefront sustainable such as local and seasonal, ethical and "clean" concerns.	IN THE LAST YEAR, IMPORTANCE of: Sustainable food meant as local, seasonal	F4 – 0.749	F2 – 0.753
	IN THE LAST YEAR, IMPORTANCE of: Ethical food meant as fair trade, animal welfare	F4 – 0.808	F2 – 0.853
	IN THE LAST YEAR, IMPORTANCE of: Natural food meant as organic, GMO-free	**F4 – 0.632**	F2 – 0.761
Madeitalianism: locavoristic or fetishistic sense of superiority attributed to "being Italian" that is trustworthy for its own sake.	'MADE IN ITALY' FOOD (reasons for buying): I trust Made in Italy	F2 – 0.731	F3 – 0.792
	'MADE IN ITALY' FOOD (reasons for buying): It means healthy food	F2 – 0.780	F3 – 0.739
	'MADE IN ITALY' FOOD (reasons for buying): It means high quality food	F2 – 0.865	F3 – 0.828
Natural caretaking: taste for organic (clean) food based on healthy and ecological sensibility (care for oneself, for universal others)	ORGANIC FOOD (reasons for buying): importance healthier for me	F3 – 0.651	F4 – 0.621
	ORGANIC FOOD (reasons for buying): importance of animal welfare	F3 – 0.688	F4 – 0.712
	ORGANIC FOOD (reasons for buying): importance of protecting the environment	F3 – 0.813	F4 – 0.846

3.2. Results and discussion

The four factors are the same for both countries, but they are ranked differently in the two countries. The variables correlated with the four factors have different weights within each factor, so that the same factors produce different patterns of value and importance among consumers in the two countries.

A first factor can be identified as **Benevolent locavorism/safetyism.** This factor explains a locavorism in which preference is given to fresh, local, and organic foods because they are considered beneficial, i.e., safer and healthier, for the beloved, concrete others. This is the first factor for both Italy and the United States, but "local" food is weighted more by Italian consumers

(It: 0.814; US: 0.796), while "healthy" (fresh and organic) is weighted more by American consumers (fresh: It: 0.851; US: 0.898; organic: IT: 0.816; US: 0.865). According to the premises made in the introduction, *patriotic* locavorism seems to feature more Italian consumers (Onorati and d'Ovidio 2021), while *safetyist* locavorism features more the American consumers (Lukianoff and Haidt 2018).

A second Factor can be referred to as **New Normal Responsibility:** It describes an empathetic response to the pandemic, as it identifies not only safetyist claims ("clean" and seasonal foods) but also ethical concerns as priorities that have become important, especially in the past year. This is the second most important factor in the U.S. and only the fourth most important (the last) in Italy, demonstrating once again how the pandemic crosses the culturally different mentalities of Italians and Americans.

A factor called **Madeitalianism** outlines an idealization of the "Italian" products present in both countries. Madeitalianism is the second factor in Italy and the third in the United States, but in both cases it describes a locavorism devoid of any green concerns and is characterized by a preconceived belief in the superiority of the Italian product that alludes to a kind of fetishization of the Italian product.

Natural caretaking is the weakest factor in both countries, but the only one that indicates a comprehensive ecological sensitivity characterized by a preference for organic food and environmental concerns.

Tab. 4 shows two configurations of sustainable eating in the "new-normal" consumers, both featured by locavorism and idealization of Made in Italy, two attitudes enhanced by the shock of the pandemic. In Italy sustainable eating is closely connected with the cult of "local" and securitarian claims beneficial to the community and concrete beloved others, while more universalistic ecological concerns, though present, are weaker. This configuration may be predictive of an increasing food nationalism. In the U.S., ecological and health claims prevail, which have led, among other things, to a fetishization of Made-in-Italy, devoid of any green concern and is loaded with safetyism. This demonstrates the importance of cultural values and vision in restructuring consumer agency in times of transition, when consumers behave as "knowledgeable and capable actors" who enable transition (Spaargaren et al. 2006, 118).

Tab. 4 – *Comparing the 4 factors in Italy and the United States.*

ITALY	USA
1 - Benevolent (locavorism)/safetyism	1 - Benevolent (locavorism)/safetyism
2 - Madeitalianism: Foodpatriotism & ideologization of Made-in-Italy	2 - New Normal Responsibility
3 - Natural caretaking (ecologism)	3 - Madeitalianism: safetyist fetishization of Made-in-Italy
4 - New Normal Responsibility	4 - Natural caretaking (ecologism)

3.3 Clusters of consumers

To verify how the four factors are distributed in the surveyed population, we performed a non-hierarchical cluster analysis based on the k-means method. This method is usually preferred for exploratory analyses of consumer segmentation, especially in the presence of numerous cases and behavioural dynamics expressed by both qualitative and quantitative variables. Consumer segmentation – i.e., dividing customers into groups with similar characteristics – obtained through k-means method, by optimising the observed behavioural similarity within the cluster and maximising the dissimilarity between clusters, helps the market better match the right product to the right customer in times of rapid change and high consumer disloyalty (Lloyd, 1957;

MacQueen, 1967). The best solution resulted in 4 clusters in both the Italian and the American samples.

Fig. 2 – *The clusters of Italian consumers*

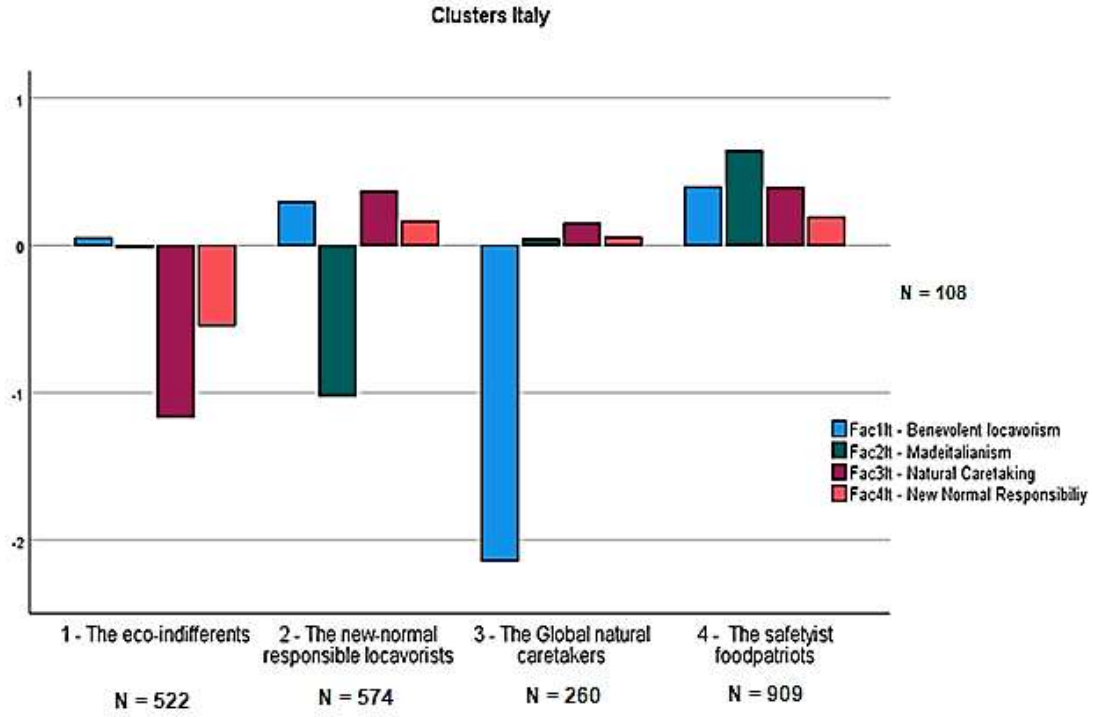
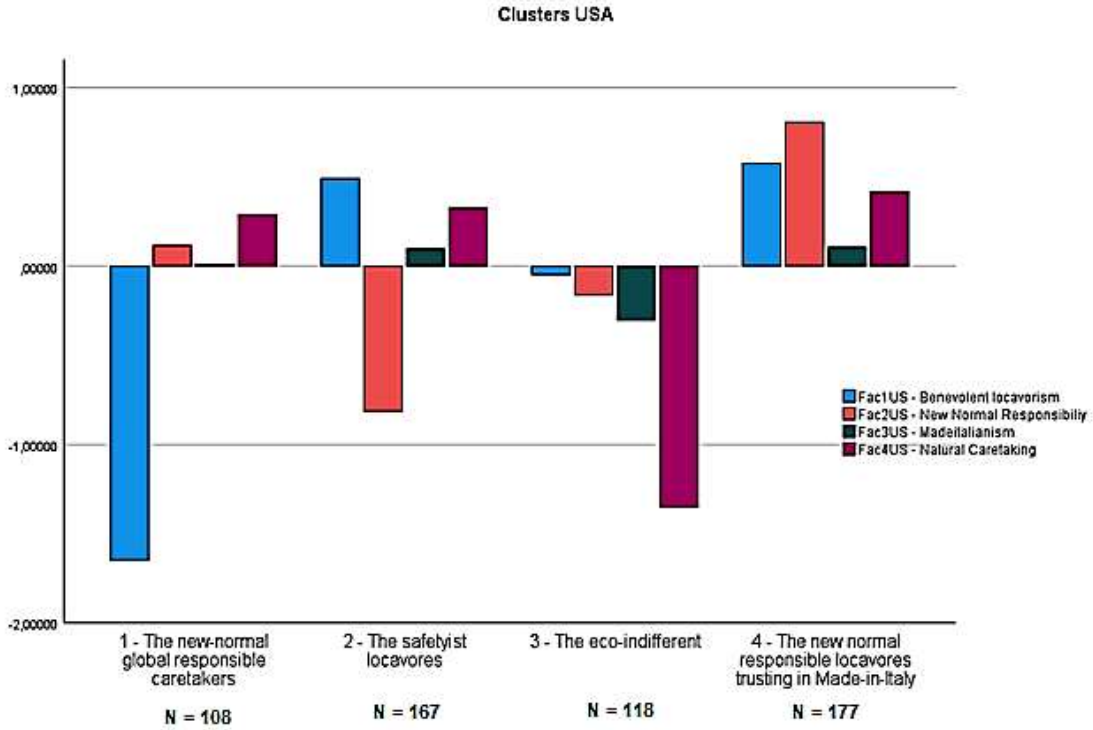


Fig. 3 – *The clusters of American consumers*



The clusters outline similar consumer profiles in both countries, with benevolent locavorism remaining the key differentiator. In the United States, the newfound sense of responsibility in response to the pandemic is more pronounced than in Italy and is evident in two clusters. In Italy, "Food patriots" are the most numerous group (909 cases) and appreciation of Made-in-Italy is the most important consumer characteristic.

4. Conclusions

Our data confirm that the crisis of paramounting proportions on a global scale is shaping new patterns of food consumption and identifying clusters of consumers:

Idealizing claims of health, safety, ethics, and ecology are the new drivers at the forefront of unsettled consumers, intersecting ambiguously with revitalizing identity claims and widespread demand for affordability due to a crisis that turns out to be "unfinished."

The data show harbingers of an emerging twofold culinary ethos in which "local" is an important prerequisite for sustainable eating. In each case, "local" is a characteristic that qualifies, on the one hand, a forward-looking sustainable locavorism based on health safety and ecologism (reducing miles, clean food) that responds to pandemic shock but also tends to fetishize made-in-Italy as a measure of quality; on the other hand, a backward-looking patriotic locavorism based on a safetyism of a patriotic and even nationalistic nature, which turns locavorism from a question of sustainable politics to an issue of identity politics (Onorati, d'Ovidio 2022). This underscores the importance of culture in differentiating the mindset and values that motivate consumers to engage in these food-related routines as "agents of change".

A cluster of eco-indifferents comes to the fore, particularly numerous in Italy, but also relevant in the United States. This group probably describes segments of the population particularly affected by the economic crisis and expressing new social needs worthy of further investigation.

Bibliography

Ben Hassen T., El Bilali H. 2022. Impacts of the Russia-Ukraine War on Global Food Security: Towards More Sustainable and Resilient Food Systems?. *Foods* 2022, *11*(15), 2301. https://doi.org/10.3390/foods11152301

Billig M. 1995. *Banal Nationalism*. SAGE Publication: London – New York.

Bourdieu, P. [1979] 1984. *Distinction: A Social Critique of the Judgement of Taste*. London: Routledge and Kegan Paul.

Brown E., Dury S., Holdsworth M. 2009. Motivations of Consumers That Use Local, Organic Fruit and Vegetable Box Schemes in Central England and Southern France. *Appetite.* 53 (2), 183–8.

Burnham K.P., Anderson D.R. (2002). *Model Selection and Multimodel Inference*. New York: Springer-Verlag.

Coldiretti. 2021. "Cibus: Svolta patriottica degli italiani a tavola (+7,6%)". September 21. accessed 24 November 2021. https://www.coldiretti.it/consumi/cibus-svolta-patriottica-degli-italiani-a-tavola-76 .

Dhakal C, Acharya B, Wang S. 2022. Food spending in the United States during the first year of the COVID-19 pandemic. *Front Public Health*. Aug 3;10:912922. doi: 10.3389/fpubh.2022.912922.

DeSoucey M. 2010. "Gastronationalism: Food Traditions and Authenticity Politics in the European Union." *American Sociological Review* 75 (3): 432–455. doi:10.1177/0003122410372226.

Eftimov T., Popovski G., Petković M., Koroušić Seljak B., Kocev D. 2020. COVID-19 pandemic changes the food consumption patterns. *Trends in Food Science & Technology*. 104: 268-272. DOI: https://doi.org/10.1016/j.tifs.2020.08.017

EIGE. 2020. *European Gender Equality Index*. Available at: https://eige.europa.eu/gender-equality-index/2020/domain/time/IT (accessed 08/09/21).

Euromonitor. 2020. "The Coronavirus Era: "The New Normal"- What Is Here to Stay?", accessed 10 September 2021. https://www.euromonitor.com/the-coronavirus-era-the-new-normal-what -is-here-to-stay-/report

Euromonitor. 2021. "Top 10 Global Consumer Trends 2021." accessed 10 September 2021. https://go.euromonitor.com/white-paper-EC-2021-Top-10-Global-Consumer-Trends.html

European Union. 2020. From Farm to Fork Strategy. Retrieved from: https://food.ec.europa.eu/system/files/2020-05/f2f_action-plan_2020_strategy-info_en.pdf (accessed 15 September 2022).

Family Caregiver Alliance. Women and Caregiving: Facts and Figures.

FAO. 2022. "World Food Situation," Food and Agriculture Organization, retrieved from: FAO Food Price Index | World Food Situation | Food and Agriculture Organization of the United Nations

Food Security Information Network (2022). *Global Report on Food Crises 2022, Global Network Against Food Crises*, retrieved from https://docs.wfp.org/api/documents/WFP0000138913/download/?_ga=2.107501570.1813096786.1653317413171320383 8.1652643473

Goodman L.A. 1961. Snowball Sampling. *The Annals of Mathematical Statistics*, 32(1): 148-170.

Hellegers P. 2022.Food security vulnerability due to trade dependencies on Russia and Ukraine. *Food Security.* https://doi.org/10.1007/s12571-022-01306-8

Horská E., Mušinská K., Tkáč F. 2021. Theoretical foreword into the new Farm-to-Table strategy. *Food, Sustainability, Nutrition and Tourism*: 261–65. ISBN 978-2-931089-17-0

Ichijo A. 2020. Food and Nationalism: Gastronationalism Revisited. *Nationalities Papers* 48 (2): 215–223. doi:10.1017/nps.2019.104.

Lloyd S. P. (1957). *Least squares quantization in PCM*. Technical Report RR-5497, Bell Lab, September.

Lukianoff G., Haidt J. 2018: *The Coddling of the American Mind*. New York: Penguin.

Martinez S., Hand M., Da Pra M., Pollack S., Ralston K., Smith T., Vogel S., Clark S., Lohr L., Low S., Newman C.. 2010. Local Food Systems: Concepts, Impacts, and Issues, ERR 97, US Department of Agriculture, Economic Research Service.

MacQueen J. B. (1967). Some methods for classification and analysis of multivariate observations. In L. M. Le Cam & J. Neyman (Eds.), *Proceedings of the fifth Berkeley symposium on mathematical statistics and probability* (Vol. 1, pp. 281–297). California: University of California Press.

News Italian Food Net. 2022. USA to be the top destination for Italian food exports in the coming years. Retrieved from: https://news.italianfood.net/2022/06/09/usa-to-be-the-top-destination-for-italian-food-exports-in-the-coming-years/ (accessed 20/10/2022).

Nunnally J. C. (1978*). Psychometric theory* (2nd ed.). New York: McGraw-Hill.

Onorati M.G., d'Ovidio F. D. 2021. Food patriotism: Italians' premiumization of Made-in-Italy food in pandemic times, in Cekani I. et al. *Proceedings Book of the 5th UNICART Interdisciplinary International Conference*: 305-311. Tirana-Bruxelles: IARC-ETQA.

Onorati M.G., d'Ovidio F. D. 2022. Sustainable eating in the "new normal" Italy: ecological food habitus between biospheric values and de-globalizing gastronationalism, *Food, Culture & Society*, DOI: 10.1080/15528014.2022.2096971.

Osservatorio Immagino. 2022. *Le etichette dei prodotti raccontano i consumi degli italiani*. 2022 (1). GS1 Italy. Retrieved from: https://gs1it.org/servizi/osservatorio-immagino/ (accessed 1/9/2022)

Parasecoli F. 2022. *Gastronativism. Food, Identity, Politics*. New York: Columbia University Press.

Pew Research Center. 2019. Women more likely than men to say they do most of the meal preparation, grocery shopping. Retrieved from: https://www.pewresearch.org/fact-tank/2019/09/24/among-u-s-couples-women-do-more-cooking-and-grocery-shopping-than-men/ft_19-08-28_genderchores_1/ (accessed 10/11/2022).

Reich B. J., Beck J. T., Price J. 2018. Food as Ideology: Measurement and Validation of Locavorism. *Journal of Consumer Research* 45 (4): 849–868.

Schulp J. A. 2015. "Reducing the Food Miles. Locavorism and Seasonal Eating." In *The Routledge Handbook of Sustainable Food and Gastronomy*, edited by P. Sloan, W. Legrand, and C. Hindley, 120–125. London: Routledge.

Spaargaren G., Martens S., and Beckers T. 2006. "Sustainable Technologies and Everyday Life." In *User Behaviour and Technology Development: Shaping Sustainable Relations between Consumers and Technologies*, edited by P. P. Verbeek and A. Slob, 107–118. Dordrecht: Springer.

United Nations. 2020. *Goal 12: Ensure Sustainable Consumption and Production Patterns*. Retrieved from: https://www.un.org/sustainabledevelopment/sustainable- consumption-production/ (accessed 15 September 2022).

Wesley E., Peterson F. 2022. The Coming Global Food Crisis. Cornhusker Economics June 8, 2022. Retrieved from: https://agecon.unl.edu/coming-global-food-crisis (accessed 15 September 2022).

ISBN: 978-2-931089-30-9

Internationalization strategies: an overview on the promotion of Made in Italy wine in the Chinese market

Federico DE ANDREIS*
Università Giustino Fortunato, Benevento - Italy

Ubaldo COMITE
Università Giustino Fortunato, Benevento - Italy

Davide MARCHISIO
FREELANCE - Italy

Abstract: The following paper aims to examine the link between globalization and internationalization of enterprises. Over the years, the environment in which companies practice has undergone radical changes, geopolitical barriers have been broken down allowing the opening of markets with consequences on the social and economic conditions and on the cultural integration. In this new scenario, enterprises that are confined to domestic markets have limited perspectives of development, resulting more vulnerable to the competitions by foreign players. It follows that in order to gain a competitive advantage there is a natural need to redefine strategic choices on the entire supply chain.
While initially companies expanded their activities abroad mainly to increase profits and enhance the strength of their brand and the perception of their products, today internationalizing is a necessary and mandatory path to survive, to defend companies' position and simultaneously to increase the degree of competition.
Through this process, various Italian products, have witnessed the radical reduction in demand from regular customers in favor of the significant increase in demand from consumers in the so-called Emerging Countries. Among them, the countries of East Asia and especially China play an increasingly important role, becoming one of the main Italian trade partners.
This could be the key element that will allow Italy and its exports to barge into the Great Wall of China. The opening to international markets of the People's Republic of China, in parallel with the growth of GDP, disposable incomes and purchasing power, together with the urbanization process still ongoing which has led most of the total population to move from rural areas to cities, forming high-density metropolises, has resulted in consumers being increasingly influenced by the western consumerist model.
The objective of the research is to analyze studies on the phenomenon of internationalization of Italian SMEs, particularly investigating the wine sector. Focusing on the importance of small and medium-sized wine enterprises in the Italian productive structure, it emerges the need to analyze the topic, developing a comprehensive analysis that guides SMEs in the wine sector in identifying the best strategies for success in selecting, entering and growing in foreign markets, especially those characterized by high cultural distance as China.
Summarizing, partly through the sector study, the paper aims to answer the following research questions.RQ1. Why are internationalization processes becoming increasingly important for Italian SMEs? RQ2. Which strategies can Italian SMEs implement to compete in culturally distant markets such as China? RQ3. What are the possibilities for the wine sector in the Asian market?

Keywords: Wine industry, Internationalization, SMEs, internationalization process, Italian wine brands

Introduction

The research examines the link between globalization and internationalization of enterprises, particularly studying the phenomenon of internationalization of Italian SMEs, above all investigating the wine sector.

* Corresponding Author: f.deandreis@unifortunato.eu

Focusing on the importance of small and medium-sized wine enterprises in the Italian productive structure, it emerges the need to analyze the topic, developing a comprehensive analysis that guides SMEs in the wine sector in identifying the best strategies for success in selecting, entering and growing in foreign markets, especially those characterized by high cultural distance as China.

Summarizing, partly also through the sector study, the paper aims to answer the following research questions.

RQ1. Why are internationalization processes becoming increasingly important for Italian SMEs?

RQ2. Which strategies can Italian SMEs implement to compete in culturally distant markets such as China?

RQ3. What are the possibilities for the wine sector in the Asian market?

This paper therefore contributes to expanding the literature on possible internationalisation tools for Italian wine enterprises, highlighting how the topic analysed is an emerging issue, which gives us the opportunity to identify new trends and future research directions and helps small and medium-sized enterprises to become aware of possible internationalisation strategies even in culturally distant markets such as China.

The article is structured as follows: section 1 deals with the literature review, section 2 describes the Italian wine market, in particular the biological one, section 3 highlights possible promotion strategies in culturally distant markets, such as China, and proceeds with the description of the interviews conducted in 20 Italian wine companies that export to China, and finally section 5 deals with conclusions and future research.

1.Enterprises internationalization process

Over the years, the environment in which companies operate has undergone radical changes. The geopolitical barriers that have allowed the spread and opening of markets have been broken down with consequences on social and economic conditions and on cultural integration between countries. Globalization, understood as the "process of increasing integration of the economies of the different areas of the world" (Valdani, Bartoli, 2010), generates an increase in competitiveness in the markets, forcing companies to deal with the worldwide economy.

To adapt to the effects of this process, organizations must undertake structural and functional modernization processes and learn to deal with new customers and with the new rules of competition on a global scale.

The continuous growth of globalization and the interoperability of markets therefore force companies to adopt innovation and internationalization strategies.

In this new scenario, companies confined to domestic markets have limited development prospects, making them more vulnerable to competition from foreign players.

In fact, if companies, initially, expanded their activities abroad mainly to increase profits and increase the strength of their brand and the perception of their products, today internationalization is a necessary and mandatory path to survive, defending the company's position and at the same time increasing the degree of competition.

The internationalization process is therefore useful and necessary both for companies that exploit this process as a means of growth, adopting strategies aimed at conquering new market shares, and for companies interested in the domestic market only, that need strategies to defend their own competitive positions already acquired.

To better understand the effects of the cross-border condition, the concept of "distance" is introduced, as the difference between countries.

Numerous scholars have in fact presented how distance affects the various processes of companies and their results (Johanson, Vahlne, 1977; Kogut, Singh, 1988; Kostova, 1999; Kostova, Zaheer, 1999; Tihanyi et al., 2005; Xu, Shenkar, 2002).

Despite the numerous possible applications of the concept of distance, cultural distance is the one most used internationally, defined as the cultural difference between countries (Tihanyi et al., 2005).

This type of distance is particularly important as it relates to the cultural values responsible for the behaviour of individuals and organizations (Kirkman, et al., 2006).

The internationalization process pushes companies to face various critical decisions for business processes, such as deciding where and when to invest and how to set up the company's business abroad to maximize benefits and minimize costs and risks (Beugelsdijk et al., 2018).

Once again, the cultural distance affects the way in which the business is developed abroad as the lack or poor cultural knowledge of the host country creates difficulties in establishing relationships of collaboration and trust with local actors.

Before presenting the theories that describe the process of internationalization of companies, it is important to analyze the development factors related to globalization and the integration of markets. These factors are in fact closely linked to political, economic and social events, both on a local and global scale (Caroli, 2012).

The first element is represented by the expansion of the market economy following the reduction or break down of artificial barriers to international trade relations.

Scientific and technological development, of an inter-organizational and international nature, has also contributed to the process of globalization and mutual interdependence of companies on a global scale.

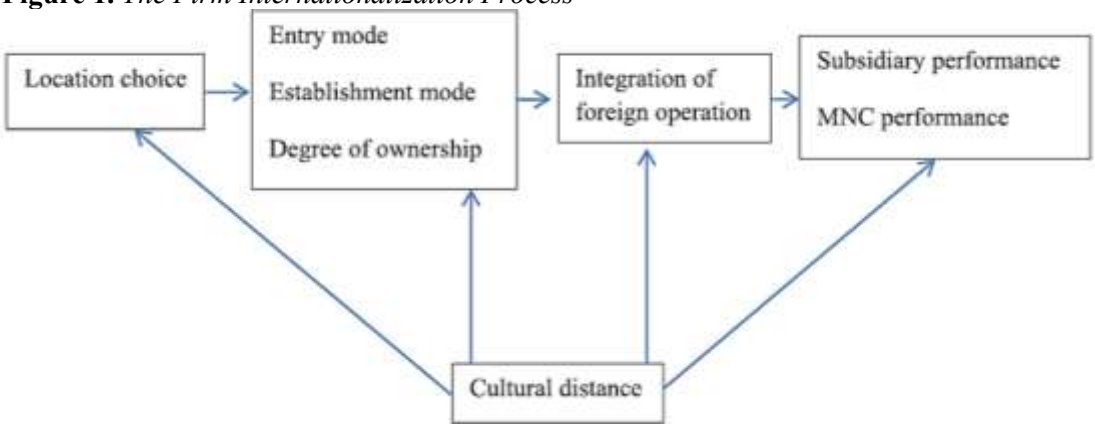
Financial markets have also played an important role, fostering the free movement of capital and creating alternatives to the traditional "financial markets", thus stimulating the development of the so-called emerging markets.

Finally, the development of new means of communication and the disposal of "artificial" borders between countries has favoured contacts between populations with different cultures, influencing local habits with different lifestyles and consumption wants.

The business internationalization process is composed of a set of strategically important key factors; an error of evaluation or implementation in each of these can cause a negative impact on the performance and results of the entire expansion process.

As described in figure 1, these key factors concern the choice of the region in which to invest, the entry methods, how much to invest and how to control activities abroad.

Figure 1. *The Firm Internationalization Process*



Source: Beugelsdijk et al. (2018)

- Location choice. It is possible to distinguish two main types of position-choosing strategies, one economical (Kindleberger, 1969; Vernon, 1966) and the other behavioural.
  The first bases the choice of the region in which to invest on a rational decision-making process based on objective factors, such as the search for the market, efficiency, natural resources or strategic assets (Dunning, 1980; Dunning, Lundan, 2008; Hymer, 1976).

The second aspect is based on the gradual learning from previous experiences of internationalization and then further expanding the company boundaries (Cyert, March, 1963; Penrose, 1959). It is therefore likely that any future expansion is towards a market somewhat similar to those where the company already operates.

- Entry and establishment mode. Once the location has been chosen, the specific organizational form of the operation must be established. Specifically, the most functional form is chosen for the business needs between Joint Venture (JT) and Wholly Owned Subsidiareis (WOS), then between acquisition or greenfield (Brouthers, Hennart, 2007; Martin, 2013; Slangen, Hennart, 2007).
- Degree of ownership. It represents the size of foreign investment, which determines the level of commitment in the host country (Ghemawat, 1991).
- Integration of foreign operation. Companies must establish how to manage operations abroad, how to set up the relationship between the parent company and the displaced unit to optimize coordination, profits and control (Bartlett, Ghoshal, 1998; Kostova et al., 2016). There are several methods to exercise control over the subsidiaries, which vary according to the allocation of assets, the identification of decision-making authorities and the level of process standardization (Kostova et al.2015).
- Firm performance analysis. Conduct by examining performance effects at both parent enterprise and subsidiary level.

To identify the best strategy for entering a foreign market, the company will have to deal with both internal and external factors. The former includes business processes and objectives, such as the characteristics of products, resources, sales and customer service channels.

The latter, on the other hand, concern environmental components, such as the social-economic-political conditions of the host country, and aspects related to the effect of the country of origin in the foreign market (Caroli, 2012). Once the risk factors related to the internationalization process have been analyzed, the company can choose the export method that best suits its needs.

The export process can be direct and indirect. In direct export, the manufacturer is responsible for organizing and managing the export activity through a commercial structure within the company. This form of export allows the company to establish direct contact with the local actors, collecting market information useful for improving the forecast of demand and comparison with the competition. Indirect export, on the other hand, involves the use of a specialized foreign operator already present in the foreign market of reference.

In this case, the production remains with the company, but risks, costs and legal-administrative management of the export is transferred to the intermediary. Although this method reduces the business risks associated with internationalization, it also has disadvantages, such as the inability of the manufacturer to know and control the market and the necessary confidence in the sales and communication strategies of third parties.

In the Italian economic context, it is above all SMEs that want to broaden their horizons abroad, both for context and competitive needs and for strategic business opportunities (Caroli, 2012). The main reasons that push SMEs to internationalize are the desires for conquest of new markets and the need to access new resources (Multinelli, 2003).

There is therefore a need to closely monitor the foreign market, establishing export strategies that allow direct contact between the company and the market through partnerships and alliances with local operators. In this way it is possible to overcome the barriers of culturally distant countries and strengthen bargaining power, increasing efficiency and profits, also by exploiting “Made in Italy” (Multinelli, 2003).

Especially in the traditional Italian sectors, such as wine, exports represent a fundamental asset for Italian SMEs. The typical export processes of SMEs include commercial agreements with agents, distributors or sales dealers, production agreements, such as subcontracting or processing for third parties, and the transfer of technologies and know-how. On the other hand, forms of distribution such as franchising and piggyback are rarely used.

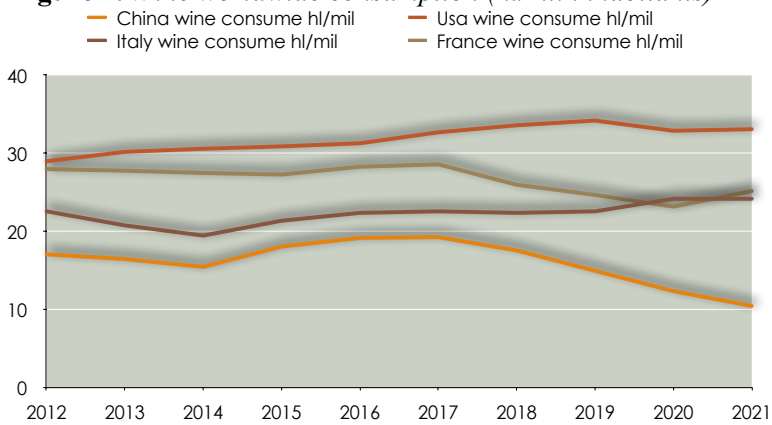
SMEs are also starting to engage in commercial and production investments abroad, such as representative offices and distribution branches, through direct investment methods in foreign markets with participation in risk capital. Unlike large multinationals, which prefer acquisition, SMEs make use of greenfield investments, partnerships and corporate joint ventures in order to directly serve foreign markets (Multinelli, Rabbiosi, 2003).

2.Sector observation

As stated, internationalizing is a necessary and mandatory path to increase the degree of competition.

Through this process, various Italian products (biological wine), have witnessed the radical reduction, or stability in demand from regular customers in favour of the significant increase in demand from consumers in the so called Emerging Countries. Among them, the countries of East Asia and especially China play an increasingly significant role, becoming one of the main Italian trade partners.

Figure 2. *Wine worldwide consumption (hl/mil inhabitants)*



Authors' elaboration (UN Comtrade, China Customs, 2022)

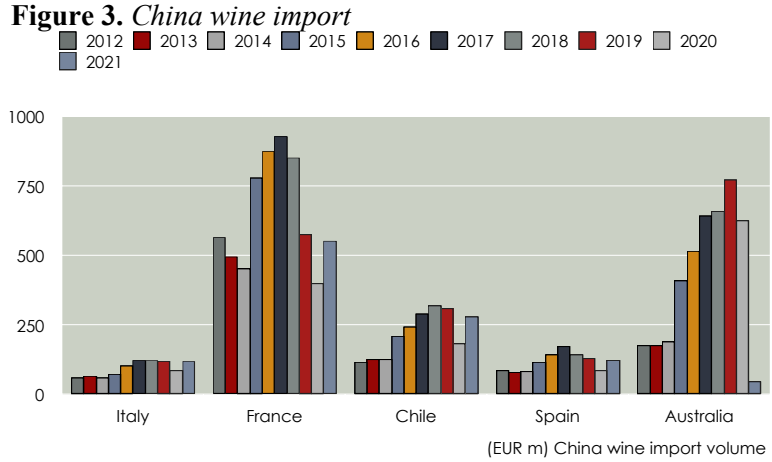
World wine consumption in 2021 is up by + 0.7% compared to 2020. Understandable and above all predictable data; yet this is a reversal of the trend compared to the decline that began in 2018 with the reduction in wine consumption in China.

The Covid-19 pandemic has globally compromised and systematically contracted the markets of the Ho.Re.Ca sector, allowing only countries that are already culturally "developed" to amortize the exponential decline of 2020 in a short time and it is precisely cultural maturity one of the main interpretations of this research.

The wine market in China is undoubtedly one of the most recent, tracing its laudable origins of mention to no more than thirty years ago. A market that has always been led by France, with market shares of 38.6%, followed by Chile + 40% and finally Italy, +34.80. Australia, second steadily in the last decade, has marked a drop of -90% due to customs duties imposed by the Beijing government in November 2020, duties that are close to 200% compared to the origin.

Taking a look at the graphic presented below (figure 3), Italy's position in the Chinese market is unequivocal: low profile but constant. But, if Australia has seen export flows reduced by 90% due to customs duties, other countries such as Chile and France have seen consumption reduced by 40% and 10% in the five-year period, failing to fully return to the pre-Covid-19 regime.

Figure 3. *China wine import*



Authors' elaboration (UN Comtrade, China Customs, 2022)

On the contrary, Italy has shown strong resilience by not only returning to the pre-Covid regime in 12 months, but by restoring the economic volumes of 2017.

But is Italy aiming for organic wine production? According to the European Regulation 203/2012, published in the official gazette of the EU on March 9, 2012, with organic wine we mean the wine with total sulfur limits for organic dry red wines at a maximum of 100 mg/l, while for dry whites it will be maximum of 150 mg/l and if

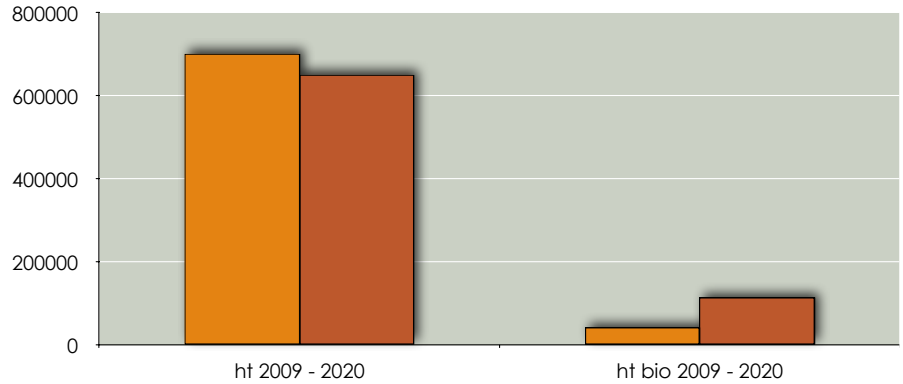
-in the vineyard: organic grapes are produced, grown without the help of synthetic chemicals (fertilizers, herbicides, fungicides, insecticides, pesticides in general) and without the use of genetically modified organisms,

-in the cellar: vinification is carried out using only the oenological products and processes authorized by Regulation 203/2012.

According to full compliance with current regulations, these wines are also allowed to carry the European logo on the label, for companies certified by an authorized body.

If we consider the hectares destined for vines between 2009 and 2020, a decrease of 7.25% is denoted, in favour of an ever increasing share destined to organic, respectively up by 163.90%. In a more careful analysis it is interesting to note that the Italian regions that compete for a higher ratio of organic hectares compared to conventional land, are to be found on average in southern Italy, and in any case in the "second tier" regions in relation to the number of denominations obtained.

Figure 4. *Conventional/organic cultivated lands destined toVitis Vinifera ratio*



Authors' elaboration (Sinab, Ismea Mercati, 2022)

But why should Italy focus on the Chinese organic market?

In Italy and Europe, the scenario of organic wine consumption is clear: a constantly growing trend, hindered by the price gap between conventional wines and organic / biodynamic wines.

According to a study by the Department of Agricultural Sciences of the University of Florence, the consumer price is the determining factor in the choice: if all three types of wines enjoyed the same price, 60% of the market would be made up of organic wines, 19% biodynamic and only 4% traditional, reflecting the increasing sensitivity in the organic sector by consumers. But by setting prices more in line with the real ones, photography brings us back to the ground with a market occupied for more than 50% by conventional wines, 8% biodynamic and under 3% organic (Mazzocchi et al., 2019).

In 2013, 441 million bottles of organic wine were consumed in Italy, France, the United States, Germany and China, the five largest consumers of wine. In 2019, 729 million. Estimates speak of a further increase of 35% by 2023.

As often happens, and has also happened in the Eurozone or the USA, the sensitivity of the consumer is correlated to the trust that the producer is able to transmit through his own product; scandals on a national scale (Guo et al., 2021) in particular in the production and sanitation system of food, are determining factors in the life of the same and it is precisely because (or thanks) to the latter that in China, in the last decade in particular, following the Western wave with a delay of about five years, the consumer has defined himself as more attentive and sensitive to the nature of the food product purchased (Liu, Ma, 2016).

But which elements are capable of pushing the potential consumer to purchase a product of organic origin? Surely the conscience and awareness of one's own state of health, purchasing power (increased by almost 80% in the last decade), previous schooling, capable of determining attention and/or scepticism on the sanitary system of the agri-food chain/industrial (Li et al., 2019), and finally, the confidence in the "Made in Italy".

It is indeed interesting to see how 40% of the consumption of products of biological origin is to be referred to the new middle-upper middle class, the so-called white-collar workers, located in the main Chinese cities such as Beijing and Shanghai. Specifically, according to the Nomisma Market survey of 2020, 19% of Chinese consumers of organic products have purchased at least one Made in Italy product. This value doubles if the same consumer has visited the "Bel Paese" in recent years.

Among citizens with incomes above RMB 16,000, the share of organic food consumers in China rises to 76%. As for those with a high degree (degree or PhD), the share reaches 74% or 68% for self-employed workers, entrepreneurs or freelancers (EFA News). The market direction is therefore well defined: but does it correspond to the market to which Italy aims with wine exports?

By setting prices more in line with the real ones, photography brings us back to the ground with a market occupied for more than 50% by conventional wines, 8% biodynamic and under 3% organic.

There is no doubt, therefore, how the "Made in Italy" brand, collective to all exporters, is strong and increasingly felt in the Chinese market; Not only that, this very element has contributed to the recovery of pre-Covid market values in a very short time, distancing itself from any other exporting country.

If Italy has an agricultural area destined for organic that is close to 16%, the same cannot be said for the other European countries: this is therefore be the key element that allow Italy and its exports to break through the Chinese wall?

3.Possible strategies

In order to better understand this aspect of Italian success in the Chinese market, we proceeded with a qualitative analysis by interviewing twenty Italian wine companies exporting to China.

For the analysis, the strategy of theoretical explanation (Yin, 1982) derived from information gathered through interviews has been chosen.

The source used for the collection of information was that of direct interviews with entrepreneurs, selected from the Italian entrepreneurial environment, to whom an open-ended unrestricted questionnaire was administered, used in a flexible form and adapted/integrated according to the specific characteristics of the individual interviewees.

In addition, it was decided to use the questionnaire as a simple outline of the interview, which was conducted orally.

Questions were mainly focused on how to ensure successful export strategies in culturally distant markets.

As analysed in the first graphic presented, consumption during the Covid-19 period has undergone considerable contractions, in all those countries that are not yet culturally "advanced".

If in Italy the culture foresees the consumption of wine usually with meals, and if the circumstances and the type of event rather affect the quality and type of wine, in other countries such as China, or Asia in general, the consumption of wine it cannot be considered remotely comparable (Liu, 2019).

The per capita consumption of the Chinese population in fact continues to be the last one.

Therefore, if the "average" Italian is unconsciously cultured and socially driven to buy a bottle of wine in a supermarket (because he is able to do so), this is not possible in China; Wine is consumed in restaurants, in shops, although online sales are present. The impact of the constant generalized quarantines in China inevitably caused the closure of these stores, exponentially exacerbating the decline that was already at a peak starting in 2018.

So what is necessary? It emerges from the practise in use that the answer is the "narration".

Emerging markets culturally far, as China, need a strong narration and contextualization of the product, something that can be obtain through marketing campaigns, communication, in-depth product description and strong presence at foreign sector events (Scalise Sugiyama, 2001).

These instruments can be traced back to those of the "narration", i.e. the storytelling that is already being done, through itinerant events throughout the country, such as QWine, ProWine, Inter-Wine etc. through which producers have the real possibility to describe, contextualize and tell the wine, something that the bottle and the label alone, in a country like China, could not achieve. The wine, in fact, passing through the customs, must have applied he label translated into Chinese language; this label often risks covering the original, and a too technical and/or essential translation does not allow the consumer to fully understand the information related to the organic production.

Due to the complexity of the storytelling structure and its involvement with the cultural aspect of society, the actions require not only a lot of patience and time, but also a lot of financial and human resources.

Given the enormous economic effort and expenditure of human resources, essential for this purpose, economic returns are to be expected not earlier than 5-6 years. But Italy is in a favourable position: it enjoys the utmost confidence, still covers a niche market, and can decide whether to increase it by proposing a differentiated, albeit dangerous, segment or to replicate, perhaps trying to do better, than other countries.

China, therefore, although still configurable as a niche for the consumption of organic products, shows trends over the years will certainly have a positive impact.

However, an in depth knowledge of the Chinese market and a long term vision are urgently needed on the part of exporting companies.

In conclusion, natural wine in China is still a niche category, consumed mainly by young and urban professionals who live in top tier cities, where the wine culture is more consolidated with the right communication, education and quality control. There are certainly growth opportunities for natural wines, however producers and importers need to be aware of the work and investments that will be required to the market and expand them.

4.Conclusions and future research

With globalisation first and the digital revolution later, going 'international' has become of paramount importance for Italian companies, especially for small and medium-sized enterprises.
It is not just a matter of starting to sell abroad or moving headquarters, but it means setting up a series of strategies and activities that embrace a broader and more articulated theme.

The internationalisation of SMEs is therefore a complex process, with several steps to be followed and requirements to be met.

It is essential to choose where to focus, and therefore to perfectly know the context in which the company wants to operate. In fact, each country has its own laws, its own tax system, as well as different targets and suppliers, as seen in the Chinese case.

Many markets, such as the wine industry, present some advantages and are therefore certainly attractive. These advantages, however, can only be exploited by those who consider, evaluate and prepare themselves in the best possible way; developing a detailed narrative to describe wine types and qualities has proved to be a valid strategy that generates positive results. Narration appears, as pointed out, to be a strategy with positive results.

Narrating wine is something that almost everyone does, with or without objectives, consciously or unconsciously, with conviction or out of necessity, but it is first and foremost something that concerns the business of producers and of companies. Narration is therefore a market strategy; in fact, this communication aspect is an integral part of market presence (Mora, Livat, 2013).

Narrating wine is an apparently simple matter; it is a commonplace that it is enough to tell something about oneself, the company, the history, the family, the grapes and the territory.

But this is not enough. Narration itself does not change the perception of a brand or a product and, above all, it does not help to transform a company into a brand in a distant and little-known market.

The activity of narrating wine for marketing or commercial purposes must necessarily be built on a strategic basis, made up of objectives, planning, monitoring and measurement.

Today, narratives have occupied a space in society that far exceeds the one occupied by reality. Narrative therefore implies a strategic vision, but also responsibility, honesty, consistency and clarity, all aspects that are underestimated today.

In fact, a brand is also built thanks to the honest, personal, planned, diffuse and constant narration of its reality.

Thus, which could be the future application of these instruments? Are these strategies applicable to other sectors (biological products)? Are these strategies applicable to other markets?

References

Bartlett, C. A., Ghoshal, S. (1998). Managing across borders: The transnational solution, Boston: Harvard Business School Press.

Beugelsdijk, S., Kostova, T., Kunst, V. E., Spadafora, E., Van Essen, M. (2018). Cultural distance and firm internationalization: A meta-analytical review and theoretical implications. Journal of Management, 44(1).

Brouthers, K. D., Hennart, J. F. (2007). Boundaries of the firm: Insights from international entry mode research. Journal of Management, 33.

Caroli M. (2012). L'internazionalizzazione delle imprese: scenari e tendenze, Caroli M., Le strategie di entrata nei mercati esteri. In (ed.) Caroli M. Gestione delle imprese internazionali, Seconda edizione, Milano: McGraw-Hill, Milano.

Cyert, R. M., March, J. G. (1963). A behavioral theory of the firm, Englewood Cliffs, NJ: Wiley-Blackwell.

Dunning, J. H. (1980). Toward an eclectic theory of international production: Some empirical tests. Journal of International Business Studies, 11.

Dunning, J. H., Lundan, S. (2008). Multinational enterprises and the global economy, Cheltenham: Edward Elgar.

Ghemawat, P. (1991). Commitment: The dynamic of strategy, New York: Free Press.

Guo M., Liu J., Yu J., (2021). Social trust and food scandal exposure: Evidence from China. China Economic Review, 69.

Hymer, S. H. (1976). The international operations of national firms: A study of direct foreign investment, Cambridge: MIT Press.

Johanson, J., Vahlne, J. E. (1977). The internationalization process of the firm: A model of knowledge development and increasing foreign market commitments. Journal of International Business Studies, 8.

Kindleberger, C. P. (1969). American business abroad. International Executive, 11.

Kirkman, B. L., Lowe, K. B., Gibson, C. (2006). A quarter century of Culture's Consequences: A review of the empirical research incorporating Hofstede's cultural value framework. Journal of International Business Studies, 36(3).

Kogut, B., Singh, H. (1988). The effect of national culture on the choice of entry mode. Journal of International Business Studies, 19.

Kostova, T. (1999). Transnational transfer of strategic organizational practices: A contextual perspective. Academy of Management Review, 24.

Kostova, T., Marano, V., Tallman, S. (2015). Headquarters-subsidiary relationships in MNCs; 50 years of evolving research. Journal of World Business, 51.

Kostova, T., Nell, P., Hoenen, A. (2016). Understanding and resolving agency problems in headquarters-subunit relationships. Journal of Management. Advance online publication.

Kostova, T., Zaheer, S. (1999). Organizational legitimacy under conditions of complexity: The case of the multinational enterprise. Academy of Management Review, 24.

Li R., Lee H. Y., Lin H. Y., Liu C. W. (2019). Tsai P. F. Consumers' Willingness to Pay for Organic Foods in China: Bibliometric Review for an Emerging Literature. International Journal of Environmental Research and Public Health, 16(10).

Liu P., Ma L. (2016). Food scandals, media exposure, and citizens' safety concerns: A multilevel analysis across Chinese cities. Food Policy, 63.

Martin, X. (2013). Solving theoretical and empirical conundrums in international strategy research: Linking foreign entry mode choices and performance. Journal of International Business Studies, 44.

Mazzocchi M., Ruggeri G., Corsi S. (2019). Consumers' preferences for biodiversity in vineyards: A choice experiment on wine. Wine Economics and Policy.

Mora P., Livat F. (2013). Does storytelling add value to fine Bordeaux wines?. Wine Economics and Policy, 2(1).

Mutinelli M. (2003) Conquistare i mercati da insider. In (eds.) Mariotti S., Mutinelli M., La crescita internazionale per le Pmi, Milano: Il Sole 24 Ore.

Mutinelli M., Rabbiosi L (2003). Le modalità dell'internazionalizzazione. In (eds.) Mariotti S., Mutinelli M., La crescita internazionale per le Pmi, Milano: Il Sole 24 Ore.

Penrose, E. T. (1959). The theory of the growth of the firm, Oxford: Oxford University Press.

Scalise Sugiyama M- (2001). Food, Foragers, and Folklore: The Role of Narrative in Human Subsistence. Evolution and Human Behavior, 22(4).

Slangen, A. H. L., Hennart, J. F. (2007). Greenfield or acquisition entry: A review of the empirical foreign establishment mode literature. Journal of International Management, 13.

Tihanyi, L., Griffith, D. A., Russell, C. J. (2005). The effect of cultural distance on entry mode choice, international diversification, and MNE performance: A meta-analysis. Journal of International Business Studies, 36.

Valdani E., Bertoli G. (2010). Mercati internazionali e marketing, Milano: Egea.

Vernon, R. (1966). International investment and international trade in the product cycle. Quarterly Journal of Economics, 80.

Xu, D., Shenkar, O. (2002). Institutional distance and the multinational enterprise. Academy of Management Review, 27.

ISBN: 978-2-931089-30-9

Rye as a Valid Alternative to Wheat, Corn and Rice in Human Food

Massimiliano MANGAFÀ*
Expert in animal nutrition and human food hygiene control - University of Bari - Italy

Abstract: Cereals have always been fundamental in the history of human nutrition. That is, man, in the course of his evolution was first a hunter and gatherer and then a farmer. With agriculture, the cultivation of cereals has developed, which has produced numerous nutritional benefits for humans. They provided, in abundance, the main nutritional principles that man needed.
The nutritional principles underlying the diet are proteins (plastic function, enzymatic, hormonal, antibody), lipids (energy reserve function, hormonal), carbohydrates (energy function), mineral salts (plastic function, osmotic, generation of impulses) , vitamins (bioregulatory function).
Proteins are composed of amino acids and their distribution within the molecule determines their biological value. That is, it determines the quality of the food based on its protein composition. The quality of the food based on its protein content is measured by a value called biological value.
Food products of animal origin have a higher biological value than those of plant origin. But there are exceptions. That is, there are plant products with a good protein and amino acid content.
Vegetable products with a higher protein content are legumes but some cereals also have a good protein content. That is, there are cereals such as rye that are rich in protein and with a good variety of amino acids.
In particular, this cereal is very nutritious and has few needs so it can be grown on less fertile soils, those in which wheat, corn, barley and rice are grown. Then there are technological treatments that increase its nutritional properties and digestibility such as grinding and micronization. Furthermore, rye flour can undergo a leavening process with mother yeast which increases its nutritional value.

Keywords: Doctors, Health, Medical Care, Medico Economic

JEL Classification: I1 Health

1 - Living organisms and thermodynamic systems

All living things, including humans are defined as thermodynamic systems open.

That is, they maintain the stability of their structure thanks to a continuum exchange of matter and energy with the external environment.

I make a few brief hints o the definitions of isolated, closed and open thermodynamic systems.

The systems SOLATED thermodynamics are those that do not exchange matter and energy with no system.

* Corresponding Author: massi.mangafa@libero.it

Obviously this is only a theoretical concept.

Indeed the only system isolated that is known is the universe which, having nothing but it, does not have trade with nothing else.

Plus there are the CLOSED thermodynamic systems that they are those who exchange only energy but not matter with external systems.

In other words a typical closed system is represented by a planet that absorbs energy from the nearby star and reflects light in space but has very little exchange of matter with the Universe. Finally, the main OPEN systems are living organisms that they preserve the stability (homeostasis) of their structure thanks to a continuous exchange of energy (light, chemical energy, and heat) and matter (water and food) with the external environment.

2 - Nutritional principles

The nutrients contained in food are basically of five types:

- proteins, carbohydrates, lipids, vitamins and minerals. PROTEINS are structures
- quaternary ie based mainly on the union of atoms of 4 types, ie carbon
- (C), nitrogen (N), hydrogen (H), oxygen (O).

They have a fundamental importance for living organisms having function structural, enzymatic, antibody and energetic.

In addition, there are CARBOHYDRATES with a primarily structural and energetic function.

Then the LIPIDS with a fundamental role as an energy source for immediate use or reserve.

Then they are a fundamental component of many hormones.

SALTS MINERALS have a structural function (they are the main constituents of bones), have a very important role in osmotic phenomena and in the formation of electrical impulses in the nervous system as well as in the formation of numerous substances indispensable in life. The human being, like all other living beings, must maintain your body's homeostasis by generating new cells and producing numerous substances essential for life.

All living beings, including man, are themselves evolved by taking the nutrients necessary for its survival from others living beings that is animals and plants.

It is essential to have a varied diet and healthy but it is useful to have valid notions of food culture that allow us to understand which foods are most useful for maintaining a good state of health health. In particular, it is necessary to evaluate a food based on the quality of the principles nutrients contained in it.

3 -Biological value

That is, speaking of proteins it is necessary to remember the concept of BIOLOGICAL VALUE. It is a parameter used to evaluate proteins ingested by the body.

In particular it is a numeric value which consider the quality, quantity and ratio of the essential amino acids present in proteins contained in the food.

That is, it expresses the amount of nitrogen absorbed net of urinary, fecal and skin losses.

In other words, a protein that has a perfect balance between absorbed amino acids and amino acids used by the body has a value equal to 100.

That is, it has a biological value equal to 100%.

For example, it is a theoretical value but the food that by definition comes closest to 100 is the egg which is the reference food for evaluating the biological value of all other foods.

4 - Man and cereals

Cereals have always been the basis of food for most peoples.

Man, in the early stages of his development, was first a collector, then a hunter opportunist (he stole prey from other animals), then hunter.

In particular, this was when he had developed enough brain to conceive community action and strategy based such as hunting in packs. Then a phase subsequent brain development caused the birth in man of the ability of abstract thinking.

This ability allowed the development of agriculture. In other words, growing plants requires higher intellectual skills than necessary to practice hunting. In fact, hunting is an instinctive act of which they are capable many animals.

On the contrary, agriculture requires the conception of a project for a long time term. That is the understanding of the link between the grain and the plant from which it is will develop, the choice of the sowing season, the care of the plant for months, the soil preparation. Then, after understanding the underlying mechanisms of agriculture the next phase was that of the domestication of plants.

In other words, there was a long process during which it was identified some merit in some wild plants. Then followed the selection phase in which the better plants were crossed in order to improve their performance.

Like this Prehistoric grasses with low productivity and resistance have become plants that we currently cultivate. For example, there are cereals with dozens of productions times higher than their prehistoric ancestors. In other words, selection tests, crossings and choice of the best environments have created cereals with such productivity to feed now billions of people.

The continuous demographic increase has produced a serious food shortages in many areas of the planet. Notably the Earth now has over eight billions of inhabitants and few states have efficient organizational systems adapted to feed their population correctly from a qualitative point of view e quantity. In addition, if we exclude the desert, cold, inhabited, mountainous areas, torrid and the forests are not many productive lands.

During its evolution historical and cultural each people has selected foods that have become the base of your diet.

For example, wheat had and still has a role fundamental in the nutrition of southern Europe and the Middle East. Lot of Asian peoples base their dishes on rice. In addition, corn is very present in American continent.

Agriculture has exploited many of the available lands. Then they are steadily shrinking due to desertification and forever greater use of land for the production of biofuels.

There are millions of square kilometers of uncultivated land because considered unsuitable for production of wheat, maize, rice, barley. The choice of these cereals was determined by complex economic calculations.

Now I mention the concept of commodity.

It is an Anglo-Saxon term that includes all kinds of matter previously usable on the markets, storable and conservable over time.

In particular commodities are agricultural or other products or even various services whose price is determined by trading on the financial markets and also by shares speculative.

Obviously widespread and consumed cereals in the world are subject to speculative actions that often raise the price of this cereal starving tens of millions.

In addition, during the most incisive speculations there have been even millions of starvation deaths. Above all the protagonists of these actions are the families that manage global grain markets such as the Cargill and the Bayer after the acquisition of Monsanto.

However, there are cereals whose sale it escapes more from the worst speculative activities because it is considered cereals minors.

5 - Rye and beneficial properties for health

Specifically I am talking about the RYE.

This plant was already cultivated 2000 or 3000 years before Christ in Asia Minor. Then the rye used as food comes from the selection of a plant existing since ancient times.

In addition, there is winter and summer rye. The variety in winter it resists the cold and a possible spring drought making it suitable even in cool and humid climates such as hilly, low mountain or European climates central. In these regions it is used both as a food for livestock and as a ingredient for bread.

But it has little use in temperate countries. For example, its presence is very scarce in the tables of many peoples such as Mediterranean or Central or South American tables. Specifically a nation which makes extensive use of it is Germany. For example, you can analyze the data of the 2004 about its production in the Teutonic country. That is, that year they were produced almost 4 million tons on an area of 635,000 hectares.

But his cultivation has not only food purposes but also serves the production of bioethanol for use as fuel. Plus it's low in gluten and that it is useful for its administration to celiac individuals.

That is, it can be safely eaten by those suffering from gluten intolerances not particularly severe. But it has the advantage of containing protein structures that react to action mechanics of processing in a similar way to gluten making it however suitable to bread making.

Then the flour of this cereal after processing, leavening and baking produces a bread with a characteristic dark color. In addition it has an aroma pleasant.

And then. besides having a pleasant taste it has numerous characteristics that increase its nutritional value. That is, it is very rich in lysine which is one of the most important fundamental amino acids.

This cereal can be ground to obtain flour which is suitable to become a basic ingredient for pasta, bread or desserts. Whole grain rye in particular produces excellent benefits for the intestine. That is, its fibers promote intestinal motility and nourish in a manner the intestinal bacterial flora thus having a good probiotic activity.

Then it has a good content of carbohydrates (69%) and protein (12%) as well as being rich in phosphorus, calcium, potassium and magnesium. Plus it has a calorie content slightly lower than that of wheat flour.

In other words 100 grams of rye flour have a calorie content of 311 kcal. Then they also have a bass fat content: 6.6%. In addition, among the flours derived from cereals that of rye has the lowest glycemic index.

Therefore it will be useful for those with high blood sugar problems such as diabetics for example. Then its consumption will have a preventive action in many cases of hyperglycemia. In addition, it has been shown that fibers have an important action antitumor.

The properties of this cereal are highly appreciated in fact it is used in phytotherapy.In other words it contains alkaloids used in the medical field such as real medicine. For example some of them can be administered alone if accompanied by a medical prescription.

In particular, the most popular alkaloids are ergotamine, dihydroergotamine, ergonovine, methysergide, cabergoline, bromocriptine, lisuride.

For example some of them like ergotamine and dihydroergotamine have a high efficacy against migraines. Then other alkaloids such as cabergoline and bromocriptine are the active ingredient of drugs used against pituitary adenomas and Parkinson's disease.

In addition, even if not proven by precise scientific evidence, rye is appreciated for its use in homeopathic medicine. That is, there are numerous empirical evidences that consider it effective in relieving the spasms of the uterine smooth muscle, convulsions, paralysis, epistaxis, haemorrhages, headache, dizziness, drowsiness, confusional states.

But then we must also evaluate the possible ones side effects of rye alkaloids.

In particular, nausea may arise, vomiting, diarrhea, weakness in the lower limbs, muscle aches, rhythm disturbances cardiac. Or psychic alterations are also possible.

However these are symptoms due to an alkaloid overdose that would be impossible to achieve with a natural diet. In fact, such events are only possible with an overdose induced with drugs containing concentrated alkaloids.

Then it is known the importance of nutrition in the prevention of cardiovascular diseases.

In other words it is very helpful to include rye among the foods of anyone who plans to benefit your cardiovascular system by using food.

For example, there is a study published in the journal Nutrition, Metabolism and Cardiovascular Disease ”which shows that rye is rich in plant sterols and therefore helps lower LDL cholesterol level and control blood sugar.

Plus it is the anti-inflammatory action of this cereal is appreciated. That is, it happens frequently that a bad lifestyle due to stress, pollution, smoking, bad diet makes the immune system hyperactive by generating a state mild but chronic chronic inflammatory.

In particular this condition, in the long run period can be very detrimental to health because it can predispose to disease chronic degenerative and cancers.

A food such as rye has action anti-inflammatory being useful against obesity and overweight, it keeps the production of anti-inflammatory cytokines and prevents the dangerous syndrome metabolic. In particular, the eating disorders typical of the modern diet can be fought with the consumption of whole grains, vegetables, fruits, fish, oil extra virgin olive oil.

That is, rye is useful to introduce into the diet because its rich in proteins and its high biological value allows it to replace in large quantity of products of animal origin.

Especially since this cereal possesses a good amount of proteins characterized by having a biological value higher than that of wheat and other cereals. In fact it is richer than the other cereals of essential amino acids lysine and threonine.

6 - Grinding of rye

Grinding is the treatment that cereals undergo to reduce their particle size and thus facilitating both processing and intestinal absorption and the action of digestive enzymes.

Modern machines for grinding cereals are said mills and the more sophisticated ones have a granulometry adjustment system of the flour that is obtained. In particular one can obtain a coarse flour or an impalpable flour the size of a few microns.

That is, depending on the need you can use the classic mills even if it is now sophisticated equipment or even micronizers that produce a flour impalpable. The choice between these two possibilities depends on the use we want to make some rye flour.

7 - Grinding and micronization

The fine grinding promotes intestinal absorption of nutrients and the action of digestive enzymes. But a too fine grind increases too much intestinal transit speed and therefore decreases absorption times. In in particular, experimental tests would be useful to evaluate the right balance between grain size of flour, intestinal transit speed and absorption of nutrients. Then a similar argument can be applied to the use of rye flour for purposes livestock, that is, as an ingredient for feeding livestock.

In a technique experimented with can also be applied to this cereal positive results in the preparation of flours for animal feed.

I mean I'm speaking of micronization. Micronization is a grinding technique that produces powders with a grain size of the order of a micrometer.

In particular the there are many milling techniques with micronizer depending on the device used. That is, the techniques may consist of the use of high-speed fluids or even in the use of infrared or ultrasound.

However all these techniques reduce the grain size by increasing the nutritional power of the rye used. Then one can cite some experimental evidence showing how animals fed with micronized foods significantly increase their capabilities productive.

8 - Rye and yeast

Even rye, like all cereals used for bread making, improves its own organoleptic properties and taste if subjected to the natural leavening process. In particularly if it is performed using mother yeast.

That is, it becomes more digestible, healthier and richer in nutrients than bread subjected to one traditional leavening. Especially since it will have a lower glycemic power.

In other words the leavening will be more effective but also longer.

Then the action of this yeast lowers the pH of the dough, favoring its absorption by the side of the body of numerous minerals.

The presence of yeast enriches the bread with folate which will then become folic acid (vitamin B9) in the body. Then the yeast degrades gluten making the bread more digestible.

Nutritional factsheet of rye, corn, wheat, rice

%	RYE	CORN	RICE	WHEAT
Carbohydrates	65	75	80	65
Proteins	11,7	9,2	7,1	12,3
Fat	2,3	3,8	0,66	2,6
Fiber	14,3	2	1,3	9,7
Lysine	4,1	2,8	0,26	2,9
Leucine	6,7	12,7	0.59	6,9
Methionine	1,6	2,1	0,27	1,6
Proline	5,2	9,6	0,33	10,3
Serine	4,2	9,2	0,375	4,8
Tryptophan	1,33	0,68	0,008	1
Valine	5,2	5,2	0,435	4,7

References

Correra C., Correra C., *Sicurezza alimentare*. Tecniche nuove, Milano 2012.

Galli A., Bertoldi A., *Igiene degli alimenti e HACCP*. EPC Libri, Roma 2012.

Gilli G., *Professione Igienista. Manuale dell'Igiene Ambientale e Territoriale*. CEA – Casa Editrice Ambrosiana, Milano 2009.

ISBN: 978-2-931089-30-9

Food crisis: REPowerEU toolbox in Energy Efficiency Technologies for sustainable food processing

Paolo SNIDERO*
IARC-USC EU Policies Committee - Consulmarc Sviluppo srl, Treviso / Bruxelles - Italy - Belgium

Abstract: After the upheavals linked to the pandemic, food production has suffered the overlap of planetary crises linked to the aggravation of the effects triggered by climate change, interruptions in supply chains, the increase in energy costs, the consequences of geopolitical crises such as war in Ukraine.
The dramatic result of this situation is a worsening in food security and access to food with particularly tragic effects for certain areas of the planet, but with a significant worsening of conditions even in the more developed areas, where it increases for the weaker sections of the population. the difficulty of accessing healthy food, in a stable, safe and above all economically compatible way.
Food processes utilize significant amounts of labor, machinery, and energy to convert edible raw materials into higher-value food products. Thus it has become significant to improve the energy efficiency, replace the existing energy-intensive operations with new energy-efficient ones, and increase the use of renewable energy in the food industry. The improvement of energy efficiency in the food industry should be considered to provide not only economic benefit but also the benefits for environmental protection, social sustainability, energy supply security, and industrial competitiveness. Industrial energy consumption can be further cost-effectively reduced by 10 to 20 % through well-structured energy management programs that combine energy conservation technologies, operation practices, and management practices. The prospective measures for the improvement of energy efficiency to be used in the food industry should be technically feasible and economically practical. The improvement of energy efficiency in food processing facilities requires the evaluation of numerous prospective measures to increase the energy usage efficiencies of the utilities such as steam, compressed air, and electricity. Various emerging technologies including novel thermodynamic cycles such as absorption refrigeration cycle, heat pump, heat pipes, and heat and power cogeneration cycles, non-thermal food processes such as irradiation, pulsed electric fields treatment, and high-pressure processing, and novel heating methods such as microwave, ohmic, and infrared heating have been developed to replace conventional energy-intensive systems used in the food industry. The new program of EU Commission REPowerEU is now operative through new directive of the Parliament who make flexible the call for tenders and authorisations roles and financial products as per toolkit of InvestEU EIF and EIB funds, identifing in the organizations of the third sector (TSE) the actors for a Co-planning, Co-programming and Co-management of interventions with specific regulatory models.

Keywords: Economic Development; Technological Change and Growth; International investment

JEL Classification: *E2 – E22 – F21 - G2 – G21- O19 – O47 – R23.*
Economic;Tech;Growth;invest;Measurement

* Corresponding Author: paolo.snidero@gmail.com

Introduction

Among the many areas in which innovation is called upon to make its capacity for improvement and transformation felt, that of food safety is today one of the most important and delicate.

After the upheavals linked to the pandemic, food production has suffered the overlap of planetary crises linked to the aggravation of the effects triggered by climate change, interruptions in supply chains, the increase in energy costs, the consequences of geopolitical crises such as war in Ukraine.

The dramatic result of this situation is a worsening in food security and access to food with particularly tragic effects for certain areas of the planet, but with a significant worsening of conditions even in the more developed areas, where it increases for the weaker sections of the population. the difficulty of accessing healthy food in a stable, safe and economically appropriate way.

Faced with a very complex situation, which sees many crisis situations add up, a role of growing importance is entrusted to technology with solutions that allow to limit risks, improve production, reduce waste, recover surpluses and redistribute them with greater efficiency and with greater equity.

Food processes utilize significant amounts of labor, machinery, and energy to convert edible raw materials into higher-value food products.

Because of the increasing energy prices and efforts for the reduction of greenhouse gas emissions, it has become significant to improve the energy efficiency, replace the existing energy-intensive operations with new energy-efficient ones, and increase the use of renewable energy in the food industry (Wang 2008).

The improvement of energy efficiency in the food industry should be considered to provide not only economic benefit but also the benefits for environmental protection, social sustainability, energy supply security, and industrial competitiveness.

Industrial energy consumption can be further cost-effectively reduced by 10 to 20 % through well-structured energy management programs that combine energy conservation technologies, operation practices, and management practices (Fischer et al. 2007). The prospective measures for the improvement of energy efficiency to be used in the food industry should be technically feasible and economically practical. The improvement of energy efficiency in food processing facilities requires the evaluation of numerous prospective measures to increase the energy usage efficiencies of the utilities such as steam, compressed air, and electricity (Wang 2008). Various emerging technologies including novel thermodynamic cycles such as absorption refrigeration cycle, heat pump, heat pipes, and heat and power cogeneration, non-thermal food processes such as irradiation, pulsed electric fields treatment, and high-pressure processing, and novel heating methods such as microwave, ohmic, and infrared heating have been developed to replace conventional energy-intensive systems used in the food industry.

Emerging technologies

These emerging technologies provide another potential to reduce energy consumption***, reduce production costs, and improve the sustainability*** of food processing.

Utilizations of energy efficiency technologies in food processing while the improvement of the energy efficiency of the existing facilities is still the main consideration for the decrease of energy costs, novel energy conservation technologies such as heat pump, supercritical fluid processing, non-thermal sterilization and pasteurization processes, and thermal energy-powered refrigeration cycles have been introduced into food processing facilities.

Capital investments should incorporate with cutting-edge and energy-efficient technologies and processes as the energy prices continue to increase.

Energy conservation is vital for the sustainable development of the food industry and reduced energy consumption through conservation, can benefit not only energy consumers by reducing their energy costs but also the society in general by reducing the use of energy resources and the emission of many air pollutants such CO2 .

To develop a sustainable society, much effort must be devoted not only to discovering renewable energy resources but also to increasing the energy efficiency of devices and processes that utilize these resources.

Because of the increasing energy prices and efforts for reduction of CO2 emission, it has become significant to improve the energy efficiency and replace the existing energy-intensive unit operations with new energy-efficient processes. Energy efficiency improvement and waste heat recovery in the food industry have been a focus in the past decades. Replacement of conventional energy-intensive food processes with novel technologies such as novel thermodynamic cycles and non-thermal and novel heating processes may provide another potential to reduce energy consumption, reduce production costs, and improve the sustainability of food production. Some novel food processing technologies have been developed to replace traditional energyintensive unit operations for pasteurization and sterilization, evaporation and dehydration, and chilling and freezing in the food industry. Most of the energy conservation technologies can readily be transferred from other manufacturing sectors to the food processing sector.

The Russian invasion of Ukraine, launched on 24 February 2022, has been a watershed moment in many ways. Not only it has brought large-scale conventional war back to European soil after decades of peace, but it has also disrupted a large number of trends on a continental and global scale. Among the domains worst affected by the conflict, energy – and the energy transition – features prominently, with two diverging effects. On the one hand, **the war and its threat to gas and oil supplies on a global level show once again the importance of fossil fuels in today's energy mix and the limits of the transition towards renewables**. The recently approved partial embargo on Russian oil and the pledge to progressively phase out Russian gas from the EU energy mix will have a considerable impact on households and enterprises in the short and medium-term. On the other hand, the conflict has highlighted how fossil fuels are affected by geopolitical tensions and has stressed the outsized role played by countries endowed with ample reserves of hydrocarbons.

The conflict has therefore effectively **created a short-term problem while strengthening the case for a long-term solution based on renewables and clean energy sources**. In fact, the energy transition is not merely an environmental issue, but also – as the Ukraine conflict dramatically shows – a matter of security and strategic autonomy.

The EU has been severely impacted by the conflict: a sharp increase in energy prices coupled with a reduction of imports from Russia is forcing the EU to find alternative suppliers and **may lead to an increase in fossil fuel consumption**, at least in the short term. This is especially at odds with the model envisioned by the **European Green Deal** the initiative to reduce greenhouse gas emissions and **decouple EU economic growth from fossil fuels**.

European Program Policies

Despite having been badly affected first by the Covid-19 pandemic, and then by the Russo-Ukrainian war, the **European Green Deal** actually predates both. The EU Commission proposed it in December 2019, with the aim of becoming global leader in the energy transition and the fight against climate change. The ambitious plan was meant to boost the European economy, restructure continental society and production, and overcome the link between the use of resources (including fossil fuels) and economic growth. In short, it has always been much more

than a climate plan. With the spread of the pandemic and the subsequent economic crisis, **the EU Green Deal** (together with the **EU Recovery Plan**) **has *developed into a tool to facilitate the economic recovery of the Union*** and provide instruments to jump-start the European economy, detaching it progressively from greenhouse gas emissions and other forms of pollution. The commitment of the Von der Leyen Commission to the environment has been significant from the very start and has been favoured by the presence within the G20 of several climate-sceptic leaders that **made the EU the *de facto* leader of the "green camp"**.

The ***European Green Deal*** and its follow-up measures, the ***Fit-for-55 package*** and the ***REPowerEU plan***, constitute a comprehensive approach that ranges from efficiency to sustainable mobility and includes clean energy and carbon adjustment mechanisms both within and outside of the Union.

The main area to be directly affected by the ongoing conflict in Ukraine is undoubtedly energy, where immediate risks arise. A rapid reduction of imports from Russia, as outlined in the Commission plans *(REPowerEU aims at reducing the demand for Russian gas by two-thirds in 2022* and the coming oil embargo should be put in place within the same deadline) presents two main challenges: **a short-term increase in the use of fossil fuels and a faster deployment of renewables in the medium to long term**. Contrary to the International Energy Agency's proposal to reduce dependency on Russia, **the European Commission does not intend to increase the consumption of coal (or other fossil sources)**, although some countries might decide to postpone the phase-out. The **main contribution in the future would come from a larger use of renewables, primarily solar and wind power**. As for solar energy, the Commission plans to simplify rules regarding the installation of solar panels and achieve 15tWh of additional capacity by the end of the year, with a **2025 target of 320 GW**, and almost 600 GW by 2030, effectively doubling today's figures. Wind energy capacity, the other key renewable component of EU clean energy, should be increased by 480GW by 2030, contributing to a significant reduction in gas demand for energy purposes.

In the ***REPowerEU plan unveiled in May 2022***, the Commission aims at reaching 1236 GW of renewable energy generation by 2030, increasing the previous 40% target of the Renewable Energy Directive to 45%. The increased role of renewables, however, requires major updates to the EU energy grid, improving connections and adapting a network largely conceived for stable fossil fuels to accommodate an extensive use of intermittent sources. In order to reach the 40% renewables target set by the Commission, significant storage capacity needs to be created: according to the European Association for Storage for Energy (EASE), by 2030 the EU would need **108GW of electricity storage, up from the 40GW capacity available in 2020. The domain of batteries is characterised by several challenges** that go well beyond the current high research costs and the limited technology available to store large amounts of electricity in relatively small batteries. These include the necessity to build industrial production capacity and to ensure a steady supply of the critical rare earths required. Conscious of these issues, in the latest EU Industrial Strategy, Brussels has strengthened the European Battery Alliance, established in 2017 to bring together industrial actors throughout the value chain of battery production, from research to production. This is a key step in **reinforcing a critical industry for the future and reducing external vulnerabilities**, although it would be unrealistic to imagine a fully autonomous EU in this regard: international cooperation with friendly partners remains the most effective tool to build a secure supply.

Not all economic sectors, though, can be electrified with the same ease. Hard-to-abate sectors and the most energy-intensive ones that are already facing the brunt of the effects of the war are of particular concern. Here, hydrogen – and especially green hydrogen – has been chosen as the main pathway towards decarbonisation. The already ambitious **Hydrogen Strategy of 2020** has been further reinforced by REPowerEU, which quadruples the target for green hydrogen supply and plans to use a large part of the energy potential provided by renewables to

produce green hydrogen. The plan aims to add 15 million tonnes of green hydrogen production by the end of 2023, up from the 5.6 million tonnes initially planned. The move, although bold, builds upon the European Hydrogen Accelerator Centre and the Commission's intention to reform energy markets and speed up the procedures related to hydrogen infrastructures, primarily storage. Yet, such high targets for green hydrogen production mean that a significant part of new renewables capacity would be dedicated to this task, requiring policymakers and stakeholders to accurately plan new energy facilities within the EU.

The **REPowerEU Pla**n aims to **reach 20 million tonnes of green hydrogen** in the EU (half internally produced, half imported), a goal that requires massive investments in infrastructures. The three main axes are the **Mediterranean corridor**, which exploits the **great potential of North African countries** to produce green hydrogen, the **North Sea** area and **Ukraine**, although this last option would heavily depend on the evolution of the conflict. However, the establishment of hydrogen-capable pipelines would require a significant overhaul of existing equipment, with **expected costs averaging between 28-38 billion euros for EU pipelines and an additional 6-11 billion for storage systems**. Financing those plans, however, would be challenging. Furthermore, the establishment of a functioning import infrastructure relies heavily on economic and political stability on the Southern Coast of the Mediterranean. An additional challenge stems from the fact that hydrogen, despite its high potential, can hardly be considered **decarbonisation**: its deployment would therefore be most effective if concentrated on hard-to-abate sectors, avoiding excessive use in areas where electrification could provide an easier option.

Massive EU investments

The transformation of the EU into a net-zero economy would require **massive investments, both from the public and the private sector**. The most recent estimates by the Commission put the **investment gap at around 520 billion euros per year**, while other analyses put the total cost as high as 855 billion annually. There is a consensus that the Ukraine war has further increased costs. Higher than expected inflation and the need for government interventions to cushion citizens and businesses from skyrocketing food and energy prices is further eroding the fiscal space of public institutions. To help channel private investment towards green and sustainable projects, the European Commission has elaborated a **taxonomy** providing a clearer picture of what would be considered compliant with ESG standards (Environmental, Social and Governance).

The **most recent integration**, adopted in March 2022, **includes – under strict conditions – nuclear energy and gas as transitional sources that could help reduce the use of more polluting fossil fuels like oil and coal**. Despite the role of the taxonomy being largely limited to the finance sector, considering that it does not mandate any kind of investment, it remains a crucial element of EU strategy: the required disclosure would put pressure on larger businesses and **help reduce the risks of greenwashing**. The combined effect of these measures, added to the required reporting compliance for both financial and non-financial undertakings, would show which areas of a company's activities are aligned to the ESG framework. Additionally, the impact of the **EU taxonomy is likely to extend far beyond the Union's borders**, since all investors offering products within the Single Market would be required to align to it, and to provide all relevant information to any investor based in the EU. This could provide **an additional "Brussels effect",** where countries follow the rules set by the EU due to the timing and importance of a common market. However, the particular context of its adoption, together with the difficulty of reaching compromises and diverging global preferences for green investments could limit this potential.

Despite the potential positive impact of the taxonomy, however, the **financial challenge remains the most pressing one for the EU**: the war in Ukraine has significantly constrained economic growth in Europe and growing public debt poses a risk for several Member States in a scenario of interest rate hikes. The limited fiscal space and the need to sustain the post-pandemic recovery are hardly compatible with massively increased green investments. To pursue its energy transformation and stay on track to reach its net-zero objectives, the EU needs additional financing tools and greater private investor involvement. According to the Renner Institute, to reach its decarbonisation objectives, **the EU would need between 11,670 and 16,320 billion euros of investments**, a huge amount of resources that would require a system of public guarantees and de-risking mechanisms to attract private investors.

The approach of using **public resources to mobilise private capital** is already being pursued by the European Commission and there is an additional possibility for Member States and stakeholders to issue green bonds to finance sustainable projects within a framework that would benefit from the taxonomy. The Commission itself estimates that in the aftermath of the Ukrainian war, the EU will have to spend additional 225 billion euros to diversify energy sources and phase out Russian oil&gas.

REPower EU Financial Tool Kit

The REPower EU action plan, to end this dependence by 2027 and increase the use of renewables will cost 210 billion euros and massive investments will be needed. This is where InvestEU, the most important investment program in the European Union, comes in.

The program, in partnership with the European Investment Bank, has a guarantee of 26 billion euros from Brussels and is expected to bring in more than 370 billion euros of public and private funding. Investments focus on four areas: sustainable investment, innovation, social inclusion and job creation. At least 30% must contribute to the carbon neutrality goal.

The REPowerEU plan aims to end Europe's dependence on Russian fossil fuels by 2030. Currently this dependence costs European taxpayers nearly € 100 billion per year. An investment of 210 billion euros is required until 2027:

113 billion euros
for renewable energy (86 billion euro) and hydrogen infrastructure (27 billion euro).

56 billion euros
for energy efficiency and heat pumps.

41 billion euros
to adapt the industry to use fewer fossil fuels.

37 billion euros
to increase biomethane production.

29 billion euros
in the power grid to allow greater use of electricity.

10 billion euros
investments to import a sufficient quantity of LNG and gas pipelines.

1.5-2 billion euros
for the security of oil supply.

In order to implement the REPowerEu program and facilitate the work of the member countries, the EU Energy Platform was launched, a platform that will make it possible to standardize the search for gas and common negotiation, as well as to coordinate the use of infrastructures, storage and gas transportation. A shared mechanism to facilitate community purchases while avoiding internal competition.

But the EU does not stop there and wants to increase the use of solar energy through the EU Solar Strategy, which aims at the use of photovoltaic roofs: alone, they would allow to satisfy at least 25% of the energy demand of the whole Union.

To achieve this goal, the obligation was introduced to install solar panels on all new commercial and public buildings with an area exceeding 250 square meters by 2026. From the following year, the obligation will also apply to buildings already existing. All new residential buildings, on the other hand, will have to have solar roofs starting in 2029.

To speed up the transition, the European Commission is ready to streamline bureaucracy and speed up the time for issuing permits that give the green light to the installation of new ***energy efficiency structures.***

FI-Compass Model. Model for a financial instrument with a grant component to support energy efficiency

The EEFI is flexible, providing potential models for Managing Authorities of Cohesion policy programmes, which can be tailored to their specific needs. As a financial instrument, the EEFI facilitates the more efficient use of public resources, doing more with less, and bringing in private investment. The grant component will help better project preparation and encourage deeper renovations, while also improving affordability for low-income households who are suffering from energy poverty. Its flexibility, efficiency, and wide applicability enables the EEFI to effectively contribute to the goals of both Cohesion Policy and REPowerEU in all Member States.

While its main focus is on energy efficiency, the EEFI also encourages the use of renewable energy sources whenever applicable – similarly to climate adaptation measures, which are incentivized throughout the model. As a model close to the market, developed by the Regional and Urban Policy DG of the European Commission and the European Investment Bank, the EEFI offers the attractive combination of grants and financial instruments in the area of energy efficiency long requested by practitioners.

Energy efficiency investments can be structured in such a way that the cost of the works is at least partially covered by savings on energy expenses. In practice, grants are often necessary for funding parts of energy projects, particularly those which have low or negative internal rates of return, or if needed for social reasons or deep renovation purposes4. Hence, in the energy efficiency sector, grants may be combined with financial instruments to:

- improve quality of projects through technical support at the preparation phase and alongside the investment cycle;
- achieve ambitious energy saving targets within an acceptable timeframe, providing incentives for final recipients to engage in deeper renovation projects with higher energy saving impact than they otherwise would implement without such a grant component;
- reduce the cost and burden of financial instrument financing;
- decrease the perceived level of risks of specific market sub-segments, such as homeowners' associations, low-income individuals or energy efficiency projects involving Small and medium-sized enterprises (SMEs) and/or Energy service companies (ESCOs);
- fight energy poverty, supporting households with low income.

MAs (Managing Authorities) can use financial instruments to address specific market needs in their Member State, without crowding out other sources of finance. Several practical solutions are highlighted in this model, for example regarding the management of the different forms of support by a financial intermediary and/or Holding Fund (HF) manager; the mechanisms to be deployed in relation to the disbursement of the grants such as capital rebates; and reporting and monitoring arrangements. Further information regarding the use of grants in combination with

financial instruments can be found in the fi-compass factsheet Combination of financial instruments and grants under shared management funds in the 2021-2027 programming period.

New European Bauhaus Model

New European Bauhaus territorial development model (NEB TDM) as a financial instrument brings a cultural and creative dimension to the European Green Deal to strengthen sustainable innovation, technology and economy. The NEB is about the spaces where we live and the way we would like to live together, while respecting the planet and protecting nature. A triangle of three inseparable core values guides the NEB:

- sustainability, from climate goals to circularity and biodiversity;
- aesthetics, quality of experience and style, beyond functionality; and
- inclusion, including accessibility and affordability.

The objective is to apply these values simultaneously to develop the creative solutions that best address people's needs, with efficiency gains and aiming for a lower overall cost.

The model FI includes the possibility of a grant component to address the more ambitious objectives set based on the transdisciplinary approach of the NEB and its core values of sustainability, aesthetics and inclusion. The model FI sets out the scope for support in terms of potential projects and technical support necessary to: (i) translate investment needs into a project pipeline6; (ii) implement projects; and (iii) develop the skills of national and regional authorities, bodies implementing the FI and urban and local bodies.

For 2021-2027 programmes that envisage initiatives and action aligned with the NEB's core values, the model FI sets out the principles of partnership and cooperation between:

- territorial authorities responsible for local or territorial integrated development strategies;
- local communities and people in urban and rural areas;
- MAs; and
- bodies implementing FIs where the programmes of 2021-2027 have envisaged initiatives and actions aligned with the core values of the NEB.

It also identifies possibilities to combine grant support with FIs in a single FI operation under Article 58 CPR.

The design of the NEB TDM offers a possibility to combine FIs and grant support, providing a long-term framework for financing development that embraces the three dimensions of the NEB, namely sustainability, aesthetics, and inclusion.

All three dimensions of the NEB TDM must be applied: (i) when designing the NEB TDM; and (ii) at the level of the investments20 supported by the instrument.

Conclusions

The *agri-food system* is now an economic reality of primary importance for all advanced societies and, in a medium-term future perspective, especially for developing countries, where the greatest resources of arable land are concentrated. In particular, agriculture, thanks to the contribution it is able to offer to the objectives of the European 20-20-20 Package, in terms of renewable energy production, fossil energy reduction and CO2 emissions reduction, represents an element priority for the sustainable development of modern societies. To safeguard the territorial, landscape and production peculiarities of the agricultural system and to fully express the opportunities related to bioenergy, it is necessary to develop a specific governance, able to reconcile economic interests with the principles of energy and environmental sustainability.

Therefore the Investment in ***sustainable agricultural production and processing food network*** *represents an exceptional opportunity and test driver for local and regional territorial administrations as well as for Private sector, since is totally incorporated in the political and institutional process of green and digital transformation connected to the debates of the new European programming and more specifically of the national and regional programming (PNRR and PRRR), for the adoption of support measures relating to the 2022 - 2027 period (https://ec.europa.eu/info/sites/info/files/communication-europe-moment-repair-prepare-next-generation.pdf).*

Impact investments for the development of local strategies in sustainable agricultural *are therefore included among "sustainable financial instruments" whose REPowerEU Tool-kit Financial Models, in particular with a "sustainable" impact as they create value for the territory and the local communities to which they are addressed, nevertheless representing a complex sector that has an enormous impact on the environment, citizenship and the economy and for this reason the most representative bodies of the category have declined specific indicators in order to be able to "measure" the ESG impact of its design elements and their environmental, social, economic and financial in order to be able to intercept the best "fund raising" strategies to collect and use the Public and Private European funds for territorial growth.*

ISBN: 978-2-931089-30-9

L'ecoturismo nelle aree interne come proposta anticrisi

Matteo LUPOLI*
Department of Sociology and Business Law- University of Bologna - Italy
Tommaso RIMONDI
Department of Sociology and Business Law- University of Bologna - Italy

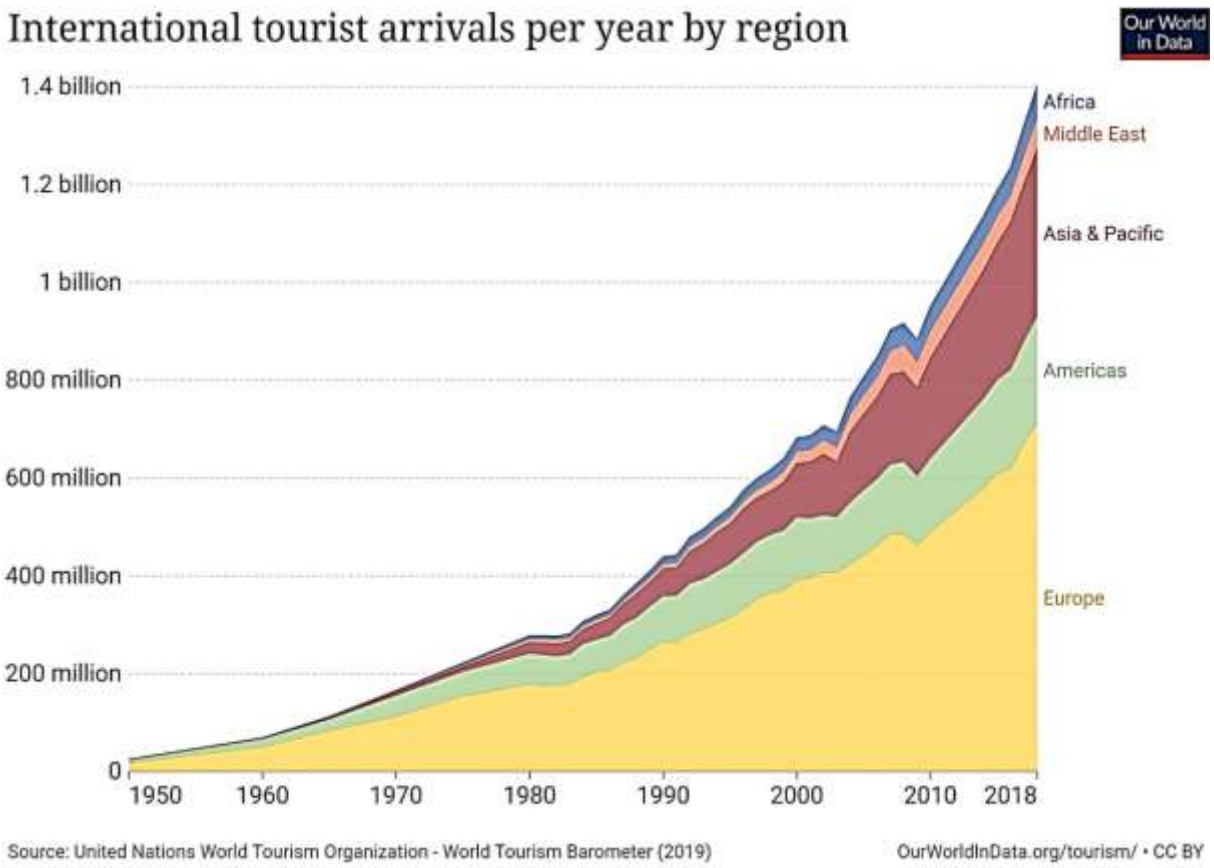
Abstract: The tourism industry has been growing since the end of WWII (as shown by UNWTO data), apart from some short stops during dramatic events such as the September 11, 2001 attack or the Sars-Cov2 virus discovery. Tourism, however, has always shown a strong resilience in the medium and long run, after the first moments of flows disruption.
Nowadays, the planet is facing many intertwined crises, as the Russian-Ukrainian conflict, the Sars-Cov2 pandemic and the ongoing ecological crisis. Therefore, a reflection is due on which touristic models have to be implemented and which has to be stopped, so as to reduce economic costs and natural-resources consumption.
We suggest that ecotourism routes, already existing in many regions of the world but still undervalued by mainstream tourism promotional circuits, can be regarded as a possible answer to this need. Our case study is the inner area of Bologna Province, in particular the municipalities grouped into the Unione dei Comuni dell'Appennino Bolognese.
Through some interviews conducted in 2022, we will show how,after decades of shrinking tourist demand in those territories, some opportunities can be rediscovered to promote new development policies based on proximity tourism, affordable and sustainable. At the same time, we will show the limits linked to the lack of structural and infrastructural supply.
Those policies aimed at promoting a tourism for everyone and environmental friendly would benefit also territories in the inner areas after decades of depopulation.

Keywords: inner areas, ecotourism, crises

Introduzione

Quella turistica è considerata essere la maggiore industria al mondo per ammontare di profitti e numero di persone impiegate. Nell'anno precedente il temporaneo arresto dei flussi turistici dovuto all'evento pandemico, il numero di arrivi a livello internazionale aveva raggiunto la quota record di 1,5 miliardi (Cheer et al., 2021) seguendo un trend di crescita continua che dura dal secondo dopoguerra, come si evince dai dati del World Tourism Barometer dell'UNWTO[1]

* Corresponding Author: matteo.lupoli2@unibo.it
[1] United Nation World Tourism Organization, è l'agenzia specializzata delle Nazioni Unite dedicata alla promozione, al coordinamento ed allo studio del turismo nel mondo. Ne fanno parte le rappresentanze governative degli stati membri (https://www.unwto.org/)



Queste valutazioni di stampo quantitativo potrebbero anche essere sottostimate se si considera da un lato il contributo dell'economia turistica informale e irregolare e dall'altro come questa industria sia fortemente interconnessa con una serie di altre attività e settori economici come i trasporti, l'edilizia, la ristorazione, il mercato di prodotti alimentari e di altri beni, lo smaltimento dei rifiuti, ecc., al punto da render complesse operazioni come la valutazione esatta del contributo economico in senso stretto (Williams, 2004). Questo continuo sviluppo si può spiegare facendo riferimento alla capacità di resilienza alle crisi capitalistiche (Murray et al., 2017) ed al configurarsi del turismo come uno degli *spatial fix* (Harvey, 2001) per la risoluzione di queste. Dopo la crisi finanziaria del 2008 per esempio sono aumentati in maniera vertiginosa gli investimenti nel settore a seguito di un vero e proprio *boom* della domanda.

> *Throughout the expansive period from the 2008 crisis to the outbreak of the COVID-19 crisis, the global touristic boom was accompanied by a sharp increase in the number of tourist accommodation buildings, and the production and settlement of tourist areas, [..] Thus, according to data from the UNWTO the number of tourist accommodation rooms,on a global scale, had increas-ed from 20.5 million in 2008 to 29.68 million in 2018. (Canada, Murray, 2021, p.20)*

Gli ultimi anni sono stati caratterizzati dall'emergere di nuove ed importanti crisi, tra loro interrelate e sempre connesse alla generale crisi ecologica ed ambientale riconosciuta a livello globale ormai dalla fine degli anni Settanta del Novecento. Tra queste occorre sicuramente menzionare la crisi legata alla pandemia da Covid-19 e quella ancor più recente connessa al conflitto tra Russia e Ucraina. L'industria turistica, che a lungo è stata considerata come s*oft* e amica dell'ambiente (Conti, Perelli, 2005), è invece al contempo concausa di queste e vittima dei loro effetti. Da un lato, infatti, è stato riconosciuto l'alto impatto ambientale che comporta:

oltre ad essere un settore economico estremamente dipendente dal consumo di risorse naturali, si stima che circa il 10% delle emissioni mondiali di anidride carbonica sia attribuibile ad essa e al suo indotto (Attili, 2020). Dall'altro lato invece queste situazioni determinano solitamente fasi di stagnazione o recessione economica tali per cui le persone tendono a diminuire le spese per consumi considerati non essenziali, tra cui quelle legate agli spostamenti turistici.
Questi eventi evidenziano la vulnerabilità dei sistemi votati esclusivamente alla promozione turistica del territorio come le cosiddette monoculture, ma non producono solitamente delle vere e proprie battute d'arresto né tantomeno alcuna svolta sistemica. Al contrario, eventi come la crisi pandemica o la crisi energetica legata allo stop di forniture dalla Russia, riteniamo possano agire come lenti d'ingrandimento provocando l'approfondimento di tendenze già esistenti. Tra queste pensiamo possa avere un ruolo di primaria importanza la riscoperta di percorsi eco-turistici in aree rurali e montane, zone in cui sperimentare forme di attraversamento lento del territorio a stretto contatto con la natura e senza allontanarsi troppo dai centri urbani.

Questi territori sono denominati in Italia *Aree interne* e sono oggetto di una precisa politica di rilancio con l'obiettivo di contrastare un decennale processo di spopolamento. Questa è stata codificata nell'intervento governativo che prende il nome di Strategia Nazionale per le Aree Interne. Messa a punto tra il 2012 e il 2014 dall'allora Ministero per la Coesione Territoriale, la Snai assume come obiettivo ultimo «l'inversione dei trend demografici: calo della popolazione e della natalità, emigrazione, aumento della popolazione anziana in misura ancora più alta della media nazionale» (DPS, 2013, pag. 20) che caratterizzano gran parte dei piccoli centri, dei borghi e degli insediamenti montani italiani. Il turismo viene riconosciuto sin dalla fase di progettazione della Snai come uno dei settori centrali per il rilancio delle aree interne. A rendere competitivi questi territori marginali nel mercato turistico sarebbe l'enorme quantità di risorse naturali presenti, *asset strategico* su cui investire per attrarre nuovi visitatori. Il turismo in queste zone dovrebbe infatti configurarsi come ecologicamente sostenibile in quanto a contatto con la natura e basato su attività che comportano un consumo di energia nullo o relativamente basso, come *trekking, forest bathing* o la riscoperta di antiche tradizioni contadine.

Per quanto intorno al concetto di sostenibilità si articolino prospettive e teorie radicalmente differenti e talvolta contraddittorie, si può certo affermare che intorno a questo concetto si sono definite alcune delle più importanti proposte per la differenziazione dei pacchetti turistici che hanno caratterizzato la transizione da una fase tipicamente fordista e standardizzata ad una neo-fordista (Conti, Perelli, 2005). Questi nuovi itinerari, che comprendono la riscoperta dei borghi di bassa montagna o il camminamento lungo i sentieri che li collegano, fino a poco tempo fa avevano occupato una posizione marginale all'interno del mercato turistico complessivo, mentre oggi stanno diventando sempre più importanti ed interessanti per un ampio bacino di consumatori. Le ragioni crediamo possano essere rintracciate in una diffusa preoccupazione per le sorti del pianeta e nella ricerca di soluzioni economicamente convenienti.

I percorsi eco-turistici nelle aree interne possono infatti fornire una risposta alle preoccupazioni che le crisi contemporanee sollevano. Innanzitutto, promuovono delle forme di relazione con il territorio più attente alla conservazione delle risorse naturali ed alla limitazione degli effetti negativi prodotti dall'intervento umano; inoltre, si configurano come proposte potenzialmente interessanti soprattutto per chi risiede nei comuni limitrofi e potrebbero per questo motivo determinare una riduzione dei lunghi e costosi viaggi motivati dal desiderio di voler trascorrere qualche giorno di vacanza all'aperto.

Itinerari ecoturistici nell'appennino bolognese

Per indagare le tematiche qui brevemente richiamate, nei primi mesi del 2022 abbiamo condotto delle interviste in profondità con gli amministratori di alcuni comuni dell'appennino bolognese.

Il caso studio è particolarmente interessante perché, negli ultimi anni, alcuni di questi comuni definiti come *aree interne* sono diventati una meta di viaggio per i turisti in arrivo dall'estero, da diverse regioni italiane e dal resto del territorio metropolitano. Questo, infatti, vede una concentrazione di comuni di dimensioni medio-piccole nell'area interna appenninica, lontani dai servizi e dalle "opportunità" urbane, concentrati nell'area sud della provincia.

Nel quadro di un vero e proprio *boom* del turismo, legato in particolare al capoluogo Bologna, anche l'appennino ha giocato la sua parte. Così, se nel corso dei dieci anni 2008-2018 gli arrivi su Bologna sono cresciuti dell'85% e le presenze del 77% (Nomisma, 2019), occorre sottolineare come l'attività di promozione del turismo cittadino abbia coinvolto, negli stessi anni, anche il territorio appenninico. Nel 2015 è stato sottoscritto un protocollo di intenti tra la Città Metropolitana, il Comune di Bologna, la Regione Emilia-Romagna e le 5 unioni di comuni in cui era organizzato in quel momento l'appennino (tra cui, in particolare, l'Unione Appennino Bolognese e l'Unione dei Comuni Valli del Reno, del Lavino e del Samoggia). Il protocollo ha riconosciuto il turismo come un importante ambito di sviluppo economico per l'intero territorio metropolitano. Per questo motivo si ritiene necessario favorire soggiorni di maggior durata che consentano al turismo a destinazione urbana di conoscere le "eccellenze" del territorio che circonda la città.

Dalle interviste che abbiamo condotto sono emersi diversi spunti rilevanti, che possiamo in qualche modo ricondurre a due questioni centrali: da un lato è stata sottolineata l'importanza di un'azione *istituzionale-amministrativa* propedeutica alla costruzione delle pre-condizioni necessarie per lo sviluppo del turismo sul territorio; dall'altro lato, gli amministratori intervistati hanno evidenziato come sia proprio una nuova *sensibilità ecologica* diffusa a venire in qualche modo in soccorso delle aree interne. Per quanto riguarda il primo punto, un passaggio fondamentale è stata la decisione di costituire l'Unione dei Comuni dell'Appennino Bolognese, nata nel 2013, che oggi comprende ben 11 comuni del territorio. Come sostengono gli intervistati, «nel 2013 con la nascita dell'Unione dei Comuni dell'Appennino Bolognese si decide di creare un'area, che è quella della Cultura e del Turismo, che si occupa solo di quello [del turismo, NdA]. Questo è importante, perché vuol dire che non fai cultura e turismo in forma residuale». Nonostante le risorse (anche umane) siano limitate, «per noi è stato comunque un passaggio importante, perché c'era tutto un sistema da costruire. Questa volontà politica, associata alla messa a disposizione di risorse, magari anche poche […] fa sì che pian piano si diffonda, lentamente ma in maniera costante, una percezione diversa di un territorio che è vivo. Questo è importante per chi ci deve venire e per chi deve investire». L'esistenza dell'Unione consente al territorio di porsi in modo più "solido" e coordinato nei rapporti istituzionali con gli enti amministrativi sovraordinati e con i tanti attori impegnati nell'ambito della promozione del territorio. «L'Unione dei comuni ha un servizio sul turismo e la cultura molto importante. Tutti gli anni prepariamo un programma importante, collaboriamo con EXTRabo a Bologna per convogliare sull'appennino più turisti possibile e far loro conoscere il territorio […]». Inoltre, nell'ambito dell'Unione si sono rafforzate la collaborazione e l'idea di lavorare in modo complessivo sul territorio appenninico, mettendo per quanto possibile da parte ogni dimensione particolaristica e identitaria in ottica competitiva: «c'è l'idea di fare squadra tra i comuni con una proposta turistica relativa a tutto l'appennino […] Le politiche vengono decise e proposte insieme, poi ogni comune ha la sua visione e le sue eccellenze, ma cerchiamo di avere sempre una linea comune e una visione globale condivisa del territorio. È un salto di qualità che stiamo facendo ora e che credo fondamentale per una proposta al passo coi tempi».

In riferimento al secondo punto, l'appennino bolognese sembra disporre -secondo gli amministratori intervistati- delle risorse necessarie per attirare una vasta platea di viaggiatori interessati a forme di turismo lento, a contatto con la natura e rispettose di essa. Addirittura, come ci è stato detto, «il turismo lento credo sia l'unica possibilità di turismo che ha questo tipo di territorio. È chiaro che deve essere associato alla valorizzazione degli aspetti paesaggistici e

ambientali». La proposta è quella di un turismo sostenibile, che si struttura come tale anche proprio per soddisfare la crescente domanda: «puntiamo in quella direzione perché chi viene da noi è questo che chiede». In questo modo, l'offerta turistica si qualifica e consente all'area interna di collocarsi sul mercato come opzione alternativa rispetto ad altre proposte più rinomate: «noi non siamo come la Toscana, abbiamo meno emergenze di tipo architettonico, storico… Dobbiamo giocare sull'aspetto paesaggio, su ciò che può offrire», «non possiamo certo sostenere la concorrenza con la riviera adriatica, la nostra proposta turistica deve essere diversa».

È interessante rilevare, poi, come il trend di crescita abbia manifestato un certo grado di resistenza rispetto alla crisi pandemica: il numero di arrivi durante la pandemia è stato -in termini relativi- significativamente migliore nell'appennino rispetto alle altre aree della provincia, incluso il capoluogo Bologna (Lupoli, Rimondi, 2022). Il turismo di prossimità ha rappresentato per molti un modo per uscire dalla città, (ri)scoprire un territorio vicino ma spesso poco conosciuto in quanto "secondario" rispetto a mete più lontane : «i nostri erano comuni che tendenzialmente avevano perso il proprio appeal turistico. Non per dei demeriti territoriali, ma perché erano cambiate le mode, le abitudini […] si viaggiava molto più facilmente, a condizioni economiche più abbordabili». Nella crisi, l'offerta turistica appenninica è parsa particolarmente capace di soddisfare le richieste e le sensibilità dei turisti "in uscita" dalle città. In questo senso, un indicatore efficace è rappresentato dal grande successo riscosso dalla Via degli Dei, il cammino che collega Bologna a Firenze attraversando l'appennino tosco-emiliano. Nonostante il crollo degli arrivi dall'estero, «parlando di credenziali […] nel 2021 sono state oltre 10 mila le credenziali vendute, mentre nel 2017 erano 1.500. Si parla di 88 operatori economici coinvolti nel 2017 contro 152 nel 2021, sono praticamente raddoppiate le strutture ricettive»[1]. Nel 2020, nel periodo peggiore della crisi pandemica, sono stati «circa 14.000 i camminatori, 6000 le cartine vendute e 6500 le credenziali, con un indotto di circa 5 milioni di euro».

Conclusioni

Quello che interessa i comuni dell'area interna bolognese potrebbe essere un esempio di turismo sostenibile dal punto di vista dell' impatto ambientale e territoriale. Il fatto di essere, nelle parole di uno degli intervistati, un «turismo economico e che fa bene alla salute» lo rende potenzialmente una modalità di viaggio in grado di andare in contro-tendenza rispetto agli effetti delle crisi interconnesse che interessano il tempo presente. Adatto "a tutte le tasche" sia per le caratteristiche delle attività che lo caratterizzano, sia per il suo essere attrattivo per visitatori "in uscita" dalle aree urbane più prossime, potrebbe consentire una riduzione degli spostamenti energivori e inquinanti. È stata osservata una crescita tendenziale nel periodo pandemico, ma i dati più aggiornati confermano tale trend anche per l'anno in corso (in cui sono venute meno le restrizioni agli spostamenti legate alla pandemia di Covid-19).

Certo, non è una strada tutta in discesa: come insegna la letteratura sulle aree interne e come gli stessi intervistati ci hanno confessato, le difficili condizioni di accessibilità possono rappresentare un ostacolo alla crescita dell'ecoturismo nelle aree interne. Investimenti spesso insufficienti sul trasporto pubblico non fanno che accrescere tale ritardo: nel caso dell'appennino bolognese, «una nota dolente è quella relativa ai trasporti. Abbiamo delle strade ancora molto impegnative come la Porrettana e un servizio ferroviario buono ma non ottimo, che dobbiamo migliorare se vogliamo diventare un'attrazione per tutti i turisti». Una questione di lungo corso nelle aree interne, che necessita probabilmente di un ripensamento della mobilità su scala metropolitana.

Supponiamo però che una nuova sensibilità ecologica sia destinata ad acquisire sempre maggiore forza alla luce della crisi ambientale, energetica ed economica che il Paese sta attraversando.

Questo, congiuntamente ad una serie di interventi politici coordinati e di investimenti mirati a valorizzare attività eco-compatibili come quelle dei camminamenti, potrebbe fornire la spinta giusta per riorientare parzialmente il turismo verso un rapporto più sostenibile con i territori, contribuendo al contempo al raggiungimento dell'obiettivo di "rigenerazione" delle aree interne italiane.

Riferimenti bibliografici

Attili G. (2020) *Le macerie dell'ipersfruttamento turistico*. In "Biosfera, l'ambiente che abitiamo". Roma: DeriveApprodi.

Canada E., Murray I. (2021). *Lockdown Touristification*. Barcellona: Alba Sud Editorial.

Cheer J.M., Lapointe D., Mostafanezhad M., Jamal T. (2021). Global tourism in crisis: conceptual frameworks for research and practice, *Journal of Tourism Futures*, Vol. 7 No. 3, pp. 278-294.

Conti G. Perelli C. (2005). *Traditional mass tourism destinations the decline of Fordist tourism facing the rise of vocational diversification, Governance and sustainability in new tourism trends*. Planum, The European Journal of Planning, XII: 1-22

De Rossi A. (a cura di) (2018), *Riabitare l'Italia. Le aree interne tra abbandoni e riconquiste,* Donzelli, Roma.

DPS. (2013). *Strategia nazionale per le Aree interne: Definizione, obiettivi, strumenti e governance*. Roma: Dipartimento per le Politiche di Sviluppo e di Coesione.

Harvey D. (2001). *Globalization and the spatial fix*. Geographische Revue, 2, pp. 23-30.

Lupoli M., Rimondi T. (2022), *Il turismo di prossimità nel territorio bolognese al tempo del Covid-19*, in Castrignanò M., Rimondi T. (a cura di), *Bologna dopo la pandemia. Impatto territoriale e scenari futuri*, FrancoAngeli, Milano.

Murray I., Cadena I, Blastule-Salom M. (2017). *The role of crises in the production, destruction and restructuring of tourist spaces. The case of the Balearic Islands*, Revista Investigaciones Turísticas, n.13, pp. 1-29.

Nomisma (2019), *La Città di Bologna e le tendenze evolutive*, Report, 3/10/2019.

Williams S. (2004). *Tourism. Critical concept in the social sciences*. London: Routledge.

ISBN: 978-2-931089-30-9

The certification schemes related to the sustainability. The case of Italian National Parks

Alfredo Ernesto DI NOIA*
Department of Economics, Management and Territory, University of Foggia, Foggia - Italy

Giulio Mario CAPPELLETTI
Department of Economics, Management and Territory, University of Foggia, Foggia - Italy

Carlo RUSSO
Department of Economics, Management and Territory, University of Foggia, Foggia - Italy

Abstract: Environmental sustainability of a territory is increasingly becoming a fundamental element of tourist attraction. National Parks could benefit from this trend principally because of their natural resource endowment. Moreover, in recent years, they have taken on an active role in several aspects related to government of the territory. In this regard, the management of the National Parks has become a laboratory to promote initiatives of sustainable tourism development that ensure the right balance between the protection of natural resources and economic and social development, with sustainability understood as an ethical choice and differentiation strategy. Therefore, the management of National Parks should be characterized by strategic goals that aim for the gradual reduction of environmental impacts, protection of natural heritage, improvement of the welfare of citizens, and protection of local identities. Thus, the managing bodies would operate by improving the sustainability and competitiveness of the tourist destination, thereby sustaining its attractiveness. Some management bodies have been able to manage and improve their touristic capital by adopting several certification schemes, although not in a systematic way. In addition, the opportunity exists for certification scheme adoption by firms of different sectors that operate in the park areas. A scheme has the function of communicating to tourists the management approach according to sustainable tourism. The paper analyzes certification schemes that are considered highly relevant at the international level: European Charter for Sustainable Tourism in Protected Area (Part I and Part II), UNESCO's Man and Biosphere Reserve, ISO 14001 certification, Eco-Management and Audit Scheme registration (Regulation EC n. 1221/2009). The analysis is intended to identify the adoption of these certification schemes in the Italian National Parks.

Keywords: National Parks; Sustainable Tourism; ECST (Part I and Part II); UNESCO MAB Reserve; ISO 14001; EMAS

JEL Classification: *Q26 Recreational Aspects of Natural Resources*

Introduction

Sustainability has gained an increasingly important role within the tourism market, becoming a competitive factor. Sustainable tourism (ST; Charter of Lanzarote of 1995) (UNWTO 1995) has been identified as stemming from that of sustainable development, and it concerns the ability of tourism to consider its current and future economic, social, and environmental effects, generated in the process of satisfying the needs of visitors, economic sectors, the environment and the local community. ST developed into support of protect natural areas (PNAs) due to

* Corresponding Author: alfredo.dinoia@unifg.it

their natural resource endowment. PNAs are territories rich in biodiversity as well as in archaeological, historical, architectural, and artistic heritage, evidence of a historical relationship between people and nature that has guaranteed the maintenance of an enormous wealth of biodiversity and landscapes. Moreover, in recent years, they have taken on the active role in several aspects related to government of the territory.

A type of PNA is the National Park (NP) according to Law 6 December 1991, n. 394. Twenty-five NPs exist in Italy, plus one in the process of being established. In this regard, the management of the NPs has become a laboratory to promote initiatives of sustainable tourism development that ensure the right balance between the protection of natural resources and economic and social development. PNAs are increasingly in-demand tourist destinations. In these protected territories, typical products include protected designation of origin, protected geographical indication, and traditional products. In recent years, trends have been in contrast with the demographic depopulation. In addition, young people are increasingly returning to the PNAs and starting new entrepreneurial initiatives, in many cases resuming and enhancing abandoned businesses or areas. However, the index of use of beds in accommodation facilities highlights the need for interventions aimed at lengthening the seasonality to enhance the opportunities linked to the combination of nature and recreational activities. Within the gravitation, basins of PNAs have numerous virtuous, such as innovative entrepreneurial experiences that are that are able to generate positive effects for the territory, such as well-being and protection of the landscape. Companies have found an economic asset in the PNAs, transforming an environmental value into a market value, and at the same time, through their activity, they have contributed to maintaining the overall biodiversity of the territory. The agriculture and the agrifood chain are drivers of sustainable development and increase employment because the products represent the meanings linked to a specific territory, perceived as having high quality and being healthy. The attractiveness of the tourist destination is the driving force for tourism in terms of the perceived value of visitors, so the protected flora and fauna can be the attraction of PNAs (Minambiente-Unioncamere, 2014).

Studies have shown that the tourist attractiveness of NPs is correlated with internal and external determinants such as reputation, amusement facilities, attractions, geographical area, and population density (de Castro et al., 2015; Puustinen et al., 2009; Neuvonen et al., 2010). The role of ST in contributing to the local economy and environmental sustainability must not be taken for granted, but rather evaluated according to the specific tourist destination demand or the perceived ability of visitors to receive benefits from a visit in the PNA. Improving the management of the PNAs has become a guarantee of quality development that exponentially increases the park effect for ST and other economic and social activities. Thus, the management of NPs should be characterized by strategic goals that aim at the gradual reduction of environmental impacts, protection of natural heritage, improvement of the welfare of citizens and protection of local identities. The managing bodies would operate by improving the sustainability and competitiveness of the tourist destination to increase its attractiveness. Some PNA management bodies have adopted several types of certification schemes with the aim of improving the environmental sustainability of their policies and, consequently, benefitting from the increase in relative competitiveness in terms of increasing the attractiveness of the tourist destination. In addition, the opportunity exists for firms that operate in the park area to adopt certification schemes in different sectors. The schemes are voluntary management instruments adopted by the PNAs that aim to certify the achievement of the objectives of protection and enhancement of the natural and landscape heritage in harmony with the socioeconomic development of the operators of the gravitation basin (Law n. 394/1991). The general purpose is to ensure the creation of a certified reputation that would favor the increase in attendance of the relative target of visitors within the principles of the ST. The paper analyzes certification schemes that are considered highly relevant at the international level: European Charter for

Sustainable Tourism in Protected Area (ECST, Part I and Part II), UNESCO's Man and Biosphere (MAB) Reserve, ISO 14001 certification, and Eco-Management and Audit Scheme (EMAS) registration (Regulation EC n. 1221/2009). The analysis is intended to identify the adoption of these certification schemes in Italian NPs.

Material and Methods

Certification scheme in the context of PNAs have a broader meaning than conformity to a standard or legislation (quality certification) or to a process (process certification) (Di Noia and Nicoletti, 2016). Certification schemes include the recognition granted to a UNESCO Man and Biosphere (MAB) reserve. Other schemes have the function of communicating the ST management approach to tourist. The bodies that manage Italian NPs have adopted several certification schemes over the past several years that are already widely recognized at the international level for the development of ST: the European Charter for Sustainable Tourism in Protected Area (ECST, Part I and Part II), UNESCO's Man and Biosphere (MAB) Reserve, ISO 14001 certification, and Eco-Management and Audit Scheme (EMAS) registration (Regulation EC n. 1221/2009).

In the first phase of our study, we analyzed the main characteristics of the certification schemes in question. Subsequently, we consulted the websites of the certification schemes in which the lists of NB organizations in the period of September 19-26, 2022, were reported. In particular, we consulted the websites of EUROPARC and Federparchi about ECTS Part I with respect to management bodies of NPs. We consulted the Federparchi website and the websites of the Italian NPs that have joined ECST Part I in order to verify whether ECTS Part II, which concerns the involvement of economic operators, has been adopted. We consulted the UNESCO website relating to MAB Reserves to investigate whether they include Italian NPs. Furthermore, we consulted the Accredia website to identify the NP bodies that have achieved UNI EN ISO 14001:2015 (ISO) certification in the sector of IAF Industry Code 36 - Public Administration. Finally, we consulted the website of the European Union in order to find out which Italian NP bodies are EMAS-registered according to NACE REV. 2 with respect to code 91.04 "Botanical and zoological gardens and nature reserves activities".

Results and Discussions

We analyzed the ECST Part I, which is a recognition conferred by the EUROPARC Federation. This is a methodological scheme and a certification that allows better management of PNAs for the development of ST. The central element of the Charter is collaboration between all interested parties (IPs) to develop a common strategy and an action plan for tourism development based on an in-depth analysis of the local situation. The objective is the protection of natural and cultural heritage and the continuous improvement of tourism management in PNAs for the benefit of the environment, the local population, businesses and visitors. ECST generates measurable economic, social and environmental benefits from well-managed sustainable tourism and strengthens relationships with local tourism operators and the wider tourism industry. The Charter provides for a Governance Model and access and membership to an extensive and dynamic European network. It provides IPs with the opportunity to receive advice. In particular, ECST provides for the pursuit of sustainability to achieve a competitive advantage. The benefits can be support for the well-being of local communities. Other benefits are the reduction of environmental impacts, the use of environmentally friendly products, encouragement for customers to respect the environment in their actions, and a commitment to energy efficiency and

water conservation, waste reduction, recycling, and better waste management. The components of ECST are a permanent forum, a strategy and action plan for ST, an evaluation process, monitoring and review, and partnership and communication. The Permanent Forum for ST includes the managing bodies of PNAs, municipalities, local associations and representatives of tourism businesses. The Strategy and Action Plan for ST is related to assessment of the current situation, general strategy, an operational action plan, and an inclusive consultation process with the approval of local actors, a five-year planning horizon, and autonomous and independent documentation. The evaluation process involves application and inspection. Monitoring and review are related to progress, results, and tourism impacts. Partnership and communication aim to create a network, ECST Part II for economic operators and ECST Part III for tour operator. In ECST Part II, companies certified by PNAs that have joined ECST Part I adhere to the ECST and become sustainable partners. In these territories, it can be important for local businesses to make their work more sustainable and, at the same time, also enjoy the benefits of operating in these certified protected areas and distinguishing themselves from others for their commitment to sustainability.

We analyzed ECST Part II for sustainable partners. The objective is to strengthen the link and to broaden mutual knowledge between the managers of PNAs and businesses connected to the tourism sector. Since 2007, the EUROPARC Federation has developed and made available the official text of ECST Part II, which establishes how tourism businesses can join the ECST. This text, or accession system, establishes a common structure at the European level to which an accredited PNA must comply to develop this phase. The methodology was updated in all its parts in 2020 in Italy by Federparchi. This membership system establishes the modalities for the development of ECST Part II in PNAs certified by the EUROPARC Federation for Part I. This is possible by following the guidelines of the EUROPARC Federation and ensuring the necessary homogeneity of the process, allowing the process to be adapted. to the specificities of each territory.

We analyzed the MAB program, which is a UNESCO program. The MAB program identifies those territories, the Biosphere Reserves (BRs), which represent a model of harmonious man-environment coexistence and which offer, through the integration of biodiversity and the conservation of ecosystem services in strategies local economies, solutions for the future challenges of humanity. The BRs are a tool for passing the modus operandi, behaviors, and knowledge for a sustainable society on to future generations. The MAB program aims to improve relations between people and the environment by establishing BRs, which include terrestrial and marine/coastal ecosystems or a combination thereof. BRs promote scientific cooperation activities, interdisciplinary research, and environmental sustainability with full involvement of local communities; therefore, they represent examples of best practice. They are sites that constitute a model of sustainable development. The BRs, while remaining under the sovereign jurisdiction of the home state, are part of the World Network of Biosphere Reserves, participation in which is optional and voluntary. The MAB objectives are reachable only through an approach based on in-depth knowledge of the territorial, cultural and anthropogenic characteristics. BRs fulfill the three functions of conservation, socio-economic development. and logistical support (research, surveillance, training, and environmental education). For BR, the correct zoning, a solid management plan, and the awareness and involvement of local communities in the management of the site are important.

Another important factor is the continuous monitoring of changes and results and the exchange of experiences. Finally, periodic self-assessment of the development of the BR, its potential, and any critical issues is necessary. Thus, MAB has an important function in the sustainable development of tourism, as sustainability has significant value (Trišić I. et al. 2022) and responds to the rise of experiential tourism and the experience economy (Ahmad H. et al., 2020). We analyzed the schemes related to ISO certification according to UNI EN ISO

14001:2015 and EMAS registration. ISO is a voluntary international standard, applicable to any type of public or private organization, which specifies the requirements for an environmental management system (EMS). The standard can be used for certification, for self-declaration, or simply as a guideline for establishing, implementing and improving an EMS.

The ISO 14001 standard, now in its third edition in 2015, is explicitly inspired by the PDCA (Plan-Do-Check-Act) model, also known as the Deming cycle. ISO is a certifiable standard, i.e., it is possible to obtain, from an accredited certification body operating within certain rules, certificates of compliance with the requirements contained therein. ISO 14001 certification is not mandatory, but is the result of the voluntary choice of a company/organization that decides to establish/implement/maintain/improve its own EMS. It is also important to note that ISO 14001 certification does not attest to a particular environmental performance and does not demonstrate a particularly low environmental impact. ISO certification demonstrates that the certified organization has an adequate management system for monitoring the environmental impacts of its activities. The ISO systematically seeks improvement in a coherent, effective, and, above all, sustainable way. In this sense, the organization can obtain some advantages (Di Noia and Nicoletti, 2016).

First is the definition of an environmental policy. In the "plan" step, an organization carries out an initial environmental analysis (IEA) to identify the "environmental aspects" of the organization, that is, establish how the company's activities, processes, and products can have an impact on the environment and define an evaluation criterion for the significance/criticality of these impacts. Another activity is to identify and define the criteria for applying the legal and other requirements and define, implement, and maintain the environmental objectives and targets related to environmental programs to achieve them, in accordance with the provisions of the environmental policy and with the requirements.

The implementation step ("do") step includes defining resources, roles, responsibilities and authorities relating to the EMS. Then comes the definition, implementation, and maintenance of procedures so that the competence, training, and awareness of the people (those who work for the organization and on its behalf) whose activities have significant environmental impacts are adequate to the needs of environmental policy. Other procedures are identified for establishing an effective internal and external communication system and for the issuance, review, modification, update, availability, accessibility, and control of the documentation of the EMS (environmental policy, objectives, goals, registrations, and procedures). There are procedures related to operational control by the EMS of activities and operations relating to significant environmental aspects and those related to the achievement of the policy and objectives. There are procedures relating to the context analysis, which also concerns the identification of the needs and expectations of IPs and which can lead to the voluntary establishment of requirements that become mandatory. Finally, there are procedures for analyzing risk and opportunities.

The "check" step includes verification of the activities carried out compared to those planned to highlight the deviations. The last step of the Deming cycle there is "act," where activities are put in place to carry out corrective actions based on deviations. One principal innovation of the new 2015 standard is context analysis related to environmental conditions capable of affecting the company or being influenced by it and all the factors that can influence the ability to achieve the expected results of the EMS. Thus, not only factor of an environmental nature are important, but also other factors, i.e., social, regulatory, economic, and competitive aspects (Iraldo and Melis, 2015) The ISO 14001 is fully implemented in the annexes of EC Regulation no. 1221/09 (EMAS III) or in the EMAS registration process, which is the last certification scheme we studied.

Finally, we analyzed the other scheme related to environmental certification: the Community Eco-Management and Audit System (Eco-Management and Audit Scheme, EMAS). This scheme is a system that companies and organizations, both public and private, based in the

European Community or outside it, that wish to engage in evaluating and improving their environmental efficiency can voluntarily join in order to obtain EMAS registration. The European Union introduced the EMAS for the registration of EMSs in organizations with reference to their specific NACE code. The first EMAS Regulation, no. 1836, was issued in 1993, and in 2001 it was replaced by Regulation no. 761 which, in turn subjected to revision, was replaced in 2009 by the new Regulation no. 1221. EMAS is intended to improve the environment and to provide organizations, supervisory authorities and citizens (the general public) with a tool through which it is possible to obtain information on the environmental performance of organizations. There are particular external benefits for PNAs with EMAS registration (Di Noia and Nicoletti, 2015). EC Regulation no. 1221/2009 (EMAS III) reiterated a specific operational relationship between EMAS and the requirements of the ISO 14001:2004 standard, establishing a correlation matrix for the creation of an EMS according to the requirements of the UNI EN ISO 14001:2004 standard contained in Annex II to EC Regulation no. 1221/2009. In September 2017, the Commission Regulation (EU) 1505/2017 came into force, which amended the annexes to the EMAS Regulation (EC) 1221/2009: Annex I "Environmental Analysis", Annex II "EMS Requirements and Other Elements to Be Taken into Account," and Annex III, "Internal Environmental Audit".

A change that was necessary to allow organizations to adapt their EMS to the new requirements related to the implementation of the innovations introduced by the new ISO 14001:2015 standard, which paid more attention to the role of IPs. Among the revisions relating to the implementation of ISO 14001:2015, for the IEA (Annex I), the revision implemented the following new requirements: the context of the organization, the needs and expectations of IPs, the life cycle assessment (LCA) perspective, and risks and opportunities. From January 2019, the Regulation (EU) 2026/2018 took effect, concerning the drafting and mandatory publication of an environmental declaration (ED) document, envisaged as an indispensable requirement to be met in the new EMAS Community Regulation (EC) no. 1221/2009. The indications are contained in Annex IV and concern the minimum requirements. EMAS provides for the publication of an ED in which detailed environmental information on operations and on the EMS is disseminated. The ED increases the transparency of the organization by contributing to the increase of its credibility and its EMS. In general, the literature has attributed the ability to involve IPs (stakeholders) to EMAS registration, which is connected to the requisite envisaged by Regulation (EC) 1221/2009 EMAS.

In the PNAs that are EMAS-registered with effective stakeholder involvement (SI) in the decision-making process, this could improve the definition and implementation of the EMS. As per EU Regulation no. 2018/2026, which adapts Annex IV of EMAS III (concerning the contents of the ED) in a manner consistent with the new ISO 14001:2015 standard in an indirect way, the approach for identifying the direct and indirect significant environmental aspects must be indicated and the approach should include the stakeholder engagement process to contribute to that identification.

In second phase of research, we surveyed the certification schemes adopted by Italian NPs and sustainable partners (ECST Part II). Table 1 shows the certification schemes in Italian NPs. We have identified some of the certification schemes in 21 Italian NPs (84% of the total). The certification scheme most adopted by Italian NPs is ECST Part I (20 NPs), and second was ECST Part II, in 8 Italian NPs. The MAB had been adopted in 7 Italian NPs. However, we noticed that the ISO (4 NPs) and EMAS (3 NPs) schemes have been adopted to a residual extent, although they are more characterized by environmental sustainability. The Cinque Terre Park has the largest number of certification schemes; only MAB is missing. Finally, the Arcipelago Toscano and Val Grande MAB reserves have adopted ECST Part I and Part II, while the SILA MAB reserve is missing ECST Part II and did not renew ISO 14001 in 2018.

Table 1 - *Certification schemes in the Italian National Parks*

NATIONAL PARK	MAB	Year	ECST part I	Year	ECST part II	EMAS	Year	ISO 14001	Year
Appennino Tosco-Emiliano	X	2015 - 2021	X	2014 - 2019					
Arcipelago Toscano	X	2003	X	2016 - 2021	X				
Cilento, Vallo di Diano e Alburni	X	1997	X	2016					
Circeo	X	1977	X	2021 [a]					
Sila	X	2014	X	2011 - 2018				2018 [b]	
Val Grande	X	2019	X	2013 - 2018	X				
Vesuvio	X	1997	X	2020					
Abruzzo, Lazio e Molise			X	2011 - 2018	X				
Alta Murgia			X	2014 - 2019					
Asinara			X	2020					
Aspromonte			X	2017					
Cinque Terre			X	2015 - 2021	X	X	2019	X	2014
Dolomiti Bellunesi			X	2015 - 2020	X	X	2004		
Foreste Casentinesi, Monte Falterona, Campigna			X	2015 - 2021	X				
Gargano			X	2017		X	2007		
Gran Sasso e Monti della Laga			X	2017					
Isola di Pantelleria			X	2021					
Monti Sibillini			X	2002 - 2010 2013 - 2019					
Pollino			X	2014 - 2019	X			X	2011
Stelvio - Stilfserjoch			X	2019					
Gran Paradiso			X	2021		X	2012	X	2017

Legend: [a] in accession; [b] expired
Source: own elaboration

Conclusions

In the research we have highlighted that these certifications represent the main schemes for increasing reputation/credibility, enabling an increase in tourist attractiveness in Italian NPs. Thus, the research shows how these certification schemes represent an asset capable of generating a competitive advantage over Italian NPs and other PNAs, as well as those tourist destinations that are not characterized by particular certification schemes relating to sustainable tourism.

Further research will be focused on measuring the perception of Italian NP governance (presidents and/or directors) regarding the role of the certification schemes adopted in relation to tourist attractiveness.

References

Ahmad H., Jusoh H., Er, A. C., Idris, M. (2020), Unpacking The Experience Of The Biosphere Reserve Tourism From The Academic Tourists' Perspectives: A Case Of Tasik Chini. Journal of Tourism, Hospitality and Environment Management, 5 (21), 163-183.

de Castro E. V., Souza T. B., Thapa B. (2015), Determinants of Tourism Attractiveness in the National Parks of Brazil, Parks, Vol. 21.2, 51-62.

Di Noia A. E., Nicoletti G. M., (2015), Emas registration for the protected natural areas: the role and importance of "external benefits", Proceeding of "Ecomondo 2015", Santarcangelo di Romagna (RN) - Italy, Ed. Maggioli, 281-287, 2015. (in Italian)

Di Noia A. E., Nicoletti G. M. (2016), ISO 14001 Certification: Benefits, Costs and Expectations for Organizations, STUDIA OECONOMICA POSNANIENSIA, vol. 4, no. 10..

Di Noia A. E., Nicoletti G. M. (2016), "Certifications" and Sustainable Tourism in Italian Protected Natural Areas, in: Proceedings Scientific Works of 20th IGWT Symposium "Commodity Science in a Changing World", 12th - 16 th September, Varna, Bulgaria, p. 408-413.

Iraldo F., Melis M. (2015), ISO 14001:2015 I Sistemi di Gestione Ambientale a un punto di svolta. Le novità della norma e linee guida per l'applicazione dei nuovi requisiti, Dispensa n. 4/2015, Assolombarda - Confindustria Milano Monza e Brianza.

Minambiente-Unioncamere (2014), L'economia reale nei parchi nazionali e nelle aree naturali protette. Fatti, cifre e storie della Green Economy. Rapporto 2014, Minambiente-Unioncamere, pp. 1-252.

Neuvonen M., Pouta E., Puustinen J., Sievänen T. (2010), Visits to national parks: Effects of park characteristics and spatial demand, Journal for Nature Conservation, 18(3), 224-229.

Puustinen J., Pouta E., Neuvonen M., Sievaenen T. (2009), Visits to national parks and the provision of natural and man-made recreation and tourism resources, Journal of Ecotourism, Vol. 8(1), 18-31.

Trišić I., Privitera D., Štetić, S., Petrović, M. D., Radovanović, M. M., Maksin, M., Šimičević D., Stanić Jovanović S., Lukić D. (2022), Sustainable Tourism to the Part of Transboundary UNESCO Biosphere Reserve "Mura-Drava-Danube". A Case of Serbia, Croatia and Hungary. Sustainability, 14, 6006.

World Tourism Organization (1995), 'Charter for Sustainable Tourism', *UNWTO Declarations,* volume 5, number 4, UNWTO, Madrid, DOI: https://doi.org/10.18111/unwtodeclarations.1995.05.04.

Sitography

https://services.accredia.it/
www.cilentoediano.it
www.europarc.org/sustainable-tourism/become-a-sustainable-destination-2/
www.europarc.org/sustainable-tourism/become-a-sustainable-partner/
www.federparchi.it/pagina.php?id=30
www.dolomitipark.it
www.gransassolagapark.it
www.islepark.it
www.parcoabruzzo.it
www.parcoaltamurgia.it
www.parcoappennino.it
www.parcoasinara.org
www.parcocirceo.it
www.parcoforestecasentinesi.it
www.parcogargano.it
www.parconazionaleaspromonte.it
www.parconazionaledelvesuvio.it
www.parconazionalepantelleria.it
www.parconazionalepollino.it
www.parconazionale5terre.it
www.parcosila.it
www.parcovalgrande.it
www.pngp.it
www.sibillini.net
www.stelviopark.it
www.unesco.it/it/italianellunesco/detail/186
https://webgate.ec.europa.eu/emas2/public/registration/list

Contribution of the authors

Introduction, References (Di Noia A.E.; Cappelletti G.M., Russo C.); Material and Methods (Di Noia A.E.); Results and Discussions (Di Noia A.E.); Supervision (Cappelletti G.M.).

ISBN: 978-2-931089-30-9

Il debito pubblico è compatibile con la sostenibilità ambientale?

Maria POMPÒ*
Università Giustino Fortunato - Italy

Abstract: This work aims to identify the limits, the problems, but also the positive aspects related to the relationship between public debt and environmental sustainability. The article considers sustainability in a broad sense, since it does not only consider environmental aspects but also economic aspects, in particular, the public debt and the weight it has on the economic system and environmental development. This work seeks to combine environmental and economic issues with the sustainability of the public debt.
In particular, the dynamics of the Italian public debt will be described, which represents an obstacle to the growth of the country and, in any case, then weighs on the European and international scene. time, up to today's situation. There will be a comparison between public finances in Europe and the international tax system. Is the theme economic sustainability and compatible with environmental sustainability?
It should not be forgotten that sustainable development sees a close link between economic growth and natural resources, and therefore, every economic policy decision must contemplate both aspects, without neglecting the principle of intra- and inter-generational equity, taking into consideration a period of time of at least two generations.
The sustainability of the public debt is an issue that weighs heavily on the main macroeconomic indicators. In particular, it is clear that the economic growth of the GDP spent can weigh on public finances. Therefore, in the following work, we will try to analyze the different possible alternatives of economic growth compatible with the concept of debt sustainability; the introduction of this research starts from this aspect.
We must not forget the criticism of monetarists regarding the Keynesian policy of deficit spending. Keynes argued that the growth of aggregate demand could be achieved thanks to the intervention of the state through deficit spending. Monetarists, on the contrary, believed that deficit spending policies would cause an increase in the interest rate, giving rise to the phenomenon of crowding out, and, consequently, a climate of mistrust would be created among investors and also inflationary pressure that would not have benefited growth; therefore the system was unproductive.For Keynes the presence of the state was fundamental in the economic system, but above all the weight of the ideas that influence and condition the actions of men, in particular of men of government; in the General Theory, in particular in the XXIV and in the last chapter: "Concluding notes on the social philosophy to which the general theory could lead", we read:Practical men, who believe themselves to be quite exempt from any intellectual influences, are usually the slaves of some defunct economist(...)".

Keywords: Public debt, environmental,economic growth.

Abstract: Il presente lavoro si pone l'obiettivo di individuare i limiti, le problematiche , ma anche gli aspetti positivi legati al rapporto tra debito pubblico e sostenibilità ambientale . L'articolo considera la sostenibilità in senso ampio, poiché non si va a considerare solo aspetti di tipo ambientale ma anche aspetti economici ,in particolare, il debito pubblico ed il peso che ha sul sistema economico e sullo sviluppo ambientale. Il presente lavoro cerca di coniugare istanze di tipo ambientale economico con la sostenibilità del debito pubblico.
Si descriverà in particolare , la dinamica del debito pubblico italiano, che rappresenta un ostacolo per la crescita del Paese e, comunque va poi a pesare nel panorama europeo ed internazionale .Dunque si cercherà di delineare l'evoluzione del debito come sia cambiato nel corso del tempo, fino alla situazione

* Corresponding Author: maria.pompo@libero.it

odierna. Non mancherà un confronto tra le finanze pubbliche in Europa e il sistema fiscale internazionale. Il tema è: la sostenibilità economica e compatibile con la sostenibilità ambientale?
Non bisogna dimenticare che lo sviluppo sostenibile vede uno stretto legame tra crescita economica e risorse naturali, e pertanto, ogni decisione di politica economica dovrà contemplare entrambi gli aspetti, senza trascurare il principio di equità intra- e inter-generazionale prendendo in considerazione un arco di tempo di almeno due generazioni .
La sostenibilità del debito pubblico è un tema che pesa moltissimo sui principali indicatori macroeconomici. In particolare, è evidente che la crescita economica del Pil speso può pesare sulla finanza pubblica . Dunque, nel seguente lavoro, si cercherà di analizzare le diverse possibili alternativi di crescita economica compatibili con il concetto di sostenibilità del debito; l'introduzione di questa ricerca parte da questo aspetto.
Bisogna, inoltre, rammentare la critica dei monetaristi riguardo la politica del deficit spending di memoria Keynesiana. Keynes sosteneva che la crescita della domanda aggregata si poteva realizzare grazie all'intervento dello stato attraverso ad una spesa in disavanzo. I monetaristi, al contrario, ritenevano che le politiche di spesa in disavanzo avrebbero provocato l'aumento del tasso di interesse , dando origine al fenomeno dello spiazzamento o *crowding out*, e, di conseguenza si sarebbe creato un clima di sfiducia tra gli investitori e anche una pressione inflazionistica che non avrebbe giovato alla crescita; pertanto il sistema era improduttivo.
Per Keynes era fondamentale nel sistema economico la presenza dello stato, tenendo presente che il peso delle idee influenzano e condizionano le azioni degli uomini, in particolare degli uomini di governo; nella *Teoria generale*, nel XXIV capitolo scrive:

> «Gli uomini pratici, che si credono di essere abbastanza esenti da qualsiasi influenza intellettuale, sono generalmente schiavi di qualche economista defunto(…)»[1]

Keywords: Debito pubblico, ambiente , crescita economica.

Introduzione

Nel lavoro si descrive la problematicità del debito pubblico , che determina incertezza non solo in Italia ma anche a livello internazionale. Nel contributo si cerca di tracciare prima l'evoluzione del debito e le politiche necessarie per la sostenibilità del debito, per poi passare a capire se un elevata inflazione può contribuire a ridurre il debito pubblico. In realtà**,** se l'inflazione non risulta alta, magari al di sotto al 5%, ci può essere una riduzione limitata del debito pubblico[2]. Se l'autorità monetaria, in particolare, facciamo riferimento alla Banca Centrale Europea (BCE), decide di non acquistare più titoli di Stato allora l'effetto di questa decisione si ripercuote sui tassi d'interesse ma anche sul rapporto debito-Pil, che aumenterebbe. L'aumento del rapporto deficit-Pil si avrebbe anche per la maggiore spesa per interessi, e questo significherebbe, per esempio per un paese come l'Italia, essere fuori dal Patto di Stabilità e Crescita[3] . Da un po' di tempo assistiamo ad un aumento del livello dei prezzi , quindi , l'inflazione risulta più alta rispetto al recente passato. L'elevato debito si spiega per la presenza di un consistente deficit pubblico. Nel 2020, i deficit pubblici erano, a titolo di esempio, attorno al 2,6 per cento del Pil in Svizzera e il 15,8 per cento negli Stati Uniti.

Andiamo poi a considerare il ruolo del Pil nella crescita economica ,che comunque viene improntata alla sostenibilità. Pertanto, si cerca di valutare l'introduzione di misure volte a riduttive il disavanzo pubblico ma anche a riduzione il rapporto Debito/PIL.[4] Dunque, sulla base di ciò valuteremo i principi che sono alla base del debito pubblico, e quali sono i provvedimenti necessari per la riduzione del rapporto deficit /Pil e, per risollevare il sistema economico . Un sistema economico deve essere improntato sulla sostenibilità ambientale, perché lo sviluppo sostenibile vede uno stretto legame tra crescita economica e risorse naturali, e pertanto, ogni decisione di politica economica dovrà contemplare entrambi gli aspetti.

1. Problematicità del Debito pubblico

[1] Keynes(1936), *Teoria Generale* .
[2] Questo si spiega perchè i nuovi titoli di debito pubblico prendono anche in considerazione il tasso di inflazione.
[3] Al momento il Patto di Stabilità e crescita e congelato , ma sicuramente sarà reintrodotto fra breve.
[4] Dal rapporto deficit / Pil dipende la credibilità e la competitività di un Paese.

Quando un Paese presenta un elevato disavanzo, significa che le spese sono maggiori dell'entrate, e per fronteggiare i bisogni economici e sociali deve indebitarsi e aumenta il deficit[5]. Va detto , inoltre, che se un Paese ha un basso debito il Paese presenta una buona solvibilità e in quel caso i titoli di Stato rappresentano attività a basso rischio in cui investire . Questo significa che non sempre il debito pubblico è qualcosa di negativo, ma diventa necessario. Tuttavia, non bisogna dimenticare che un elevato debito pubblico non fa bene ad un sistema economico, perché rallenta nel lungo periodo il tasso di crescita; dunque, si presenta il fenomeno conosciuto nella teoria economico come i "crowding out", ossia uno spiazzamento degli investimenti privati a causa un innalzamento dei tassi di interesse. Pertanto, un elevato debito pubblico rallenta la crescita potenziale di un Paese.[6] In base ad uno studio condotto dal Fondo Monetario Internazionale si ritiene che il rallentamento economico sia graduale, ma certamente un Paese che presenta un rapporto debito/Pil al 120 per cento mostra una crescita annua inferiore al 1 per cento rispetto a quella di un Paese con un rapporto pari al 60 per cento. Il debito elevato rappresenta un pericolo per la crescita se si manifestano effetti destabilizzanti , ovvero , i mercati finanziari non hanno più fiducia nello stato ritenendo che non sia più in grado di assolvere al debito, si manifesta per loro una mancanza di solvibilità . La crisi del 2012 ha messo in luce come la crisi finanziaria sul mercato ha degli effetti pesanti sul sistema economico di un paese. Per il FMI nel momento in cui il rapporto debito /Pil va oltre 85% , il Paese entra in una soglia critica.[7] Sicuramente un elevato debito pubblico non giova all'economia perchè, in presenza di recessione la politica di bilancio espansiva, centrata sulla maggiore spesa pubblica, non può essere utilizzata per sostenere l'economia[8]. A titolo di esempio possiamo ricordare che durante la crisi del 2008 i paesi con basso debito, come la Germania adottarono politiche fiscali espansive , per l'Italia questo non fu possibile visto l'elevato debito[9] .

Il debito italiano purtroppo non cenna a diminuire ma cresce sempre di più. ***Tra il 2015 e il 2019 è aumentato di oltre 170 miliardi. Nel 2020 è aumentato di oltre 160 miliardi***,[10] un debito che corrisponde al 157,5% del Pil italiano. Questi dati mettono in evidenza che per un Paese come l'Italia il debito pubblico ostacola la crescita economica, creando non pochi problemi. (Banca d'Italia). Naturalmente il debito pubblico va visto in relazione al Pil[11], pertanto maggiore il Pil minore sarà il rapporto debito/ Pil e maggiore sarà la possibilità di far crescere la spesa pubblica in disavanzo. Dal 2018 L'Italia presenta un rapporto debito/Pil superiore al 130per cento[12] . In termini di politica economica questo significa che per l'Italia non è facile intraprendere politiche anticicliche e con possibilità di crisi sul mercato dei titoli. Il grande problema dell'Italia è il pagamento degli interessi maturati sul debito pubblico; tra il 2009 e il 219 gli interessi pagati hanno comportato una spesa pari a 780 miliardi. ***Benché l'Italia abbia una situazione non facile in termini di finanza pubblica, tuttavia, dal 2009 al 2020*** il suo bilancio è stato chiuso con un avanzo primario. Il problema sorge quando l'avanzo primario è basso ma il tasso di interesse supera il tasso di crescita dell'economia, perché in questo modo il debito risulta maggiore del Pil , ovvero, nel rapporto debito /Pil il numeratore superiore il Pil, quindi, il rapporto cresce; se tale situazione si perpetua nel tempo i mercati finanziari non hanno più fiducia nella solvibilità dello Stato. Dunque, per evitare l'insostenibilità del debito pubblico è necessario intervenire con misure che riducono il debito pubblico[13] è questo implica o un aumento delle tasse o un taglio della spesa pubblica; in alternativa, il governo può optare per la privatizzazione[14] ;ultima *ratio* il governo può decidere la ristrutturazione del debito[15]; normalmente questa via non viene perseguita

[5] Si tratta di risorse chieste per finanziare gli investimenti pubblici fondamentali per la crescita di un Paese.
[6] Per alcuni la soglia critica sarebbe al 40-50 per cento di Pil, altri 80-90.
[7] In realtà non esiste un valore che rappresenti il limite oltre il quale si può manifestare la crisi.
[8] Renderebbe insostenibile il debito pubblico
[9] Nel 2018 il debito pubblico italiano era pari a circa 2.300 miliardi di euro.
[10] **Nel Dicembre 2020 l'Italia presentava un debito di circa 2.569 miliardi di euro (Bankitalia)**.
[11] Il Pil esprime le risorse di cui lo stato dispone per pagare i tassi di interesse maturati sul debito
[12] Nel 2018 il rapporto debito /Pil è stato pari al 131%.
[13] Questo significa ridurre anche la spesa per interessi.
[14] Vendita di attività statali.
[15] Questo significa allungare le scadenze e ridurre il tasso di interesse.

perché metterebbe in cattiva luce il paese e poi i possessori di titoli di stato andrebbero incontro a delle perdite. In sintesi, questo percorso porterebbe alla recessione.

Se le entrate non sono sufficienti a coprire le spese si va incontro ad un deficit di bilancio. Per quanto riguarda l'Italia possiamo ricordare che tra il 1987 e il 1993 presentava deficit pubblici superiori al 10 % del Pil. Il saldo primario è stato negativo negli anni Ottanta, mente ha raggiunto il pareggio nel 1991 e, fino al 2008 chiudeva il bilancio con avanzi. Dal 2011, sono state intraprese in tutte Europa politiche di contenimento della spesa pubblica a causa della crisi economica. Questi interventi hanno giovato ai conti pubblici. E' evidente, dunque, che un elevato rapporto debito/Pil limita le scelte di politica economica, perché molte risorse pubbliche devono essere destinate al debito sia per motivi di credibilità che di solvibilità, perchè aumenterebbe la spesa per interessi dovendo pagare un tasso d'interesse elevato sui titoli del debito.

Secondo l'approccio keynesiano, aumentare il debito pubblico significa far crescere il Pil (politica del *deficit spending*) . Se le cose stanno in questi termini, il debito pubblico aggiuntivo "si autofinanzia" grazie alla crescita generata dall'aumento del debito. Nella realtà, questo risulta vero se la spesa pubblica aggiuntiva, finanziata a debito, risulta più produttiva della spesa privata. La spesa pubblica finanziata in disavanzo si somma alla spesa privata , non si sostituisce alla spesa privata. Non mancano posizioni opposte a quella Keynesiana, in cui si mette in luce il rallentamento della crescita dovuto all'elevato debito, in particolare questo effetto si manifesta se il debito supera il 60% del Pil. Un rapporto debito / Pil oltre il 60% non stimola la crescita del Pil per gli elevati interessi sul debito. Dunque, importante per un Paese creare una situazione di sostenibilità di bilancio e di crescita del Pil per fare in modo che i risparmiatori continuino ad acquistare i titoli di debito pubblico. L'acquisto e condizionata alla credibilità del Paese; poca credibilità significa tassi di interesse elevati sui titoli pubblici , il che implica più spesa e più debito , il tutto diventa insostenibile.

Il debito pubblico non può crescere senza alcun limite perché questo significa cattiva gestione della cosa pubblica . Per essere credibili bisogna pensare , in alcuni casi anche a politiche di rientro del debito e questo può essere raggiunto attraverso l'aumento delle entrate, ovvero , con una maggiore pressione fiscale[16]. Senza dimenticare che bisogna sempre garantire e salvaguardare il benessere della collettività.

Tuttavia, bisogna sottolineare che l'attuazione di una politica fiscale restrittiva basata sull'aumento della pressione fiscale risulta impopolare , e non viene condivisa da molti economisti. A riguardo possiamo indicare la "curva di Laffer". Questa teoria economica, elaborata dall'economista statunitense Arthur Laffer, condizionò molto la politica economica della presidenza di Ronald Reagan negli Stati Uniti. Secondo la curva di Laffer bisogna diminuire le aliquote sulle tasse per far crescere il gettito tributario, infatti, vi è un livello di tassazione oltre il quale non conviene nè investire nè produrre. L'elevata pressione fiscale, quindi, disincentiva l'attività economica e riduce, di conseguenza, il gettito tributario. La politica fiscale giusta deve basarsi su una bassa pressione

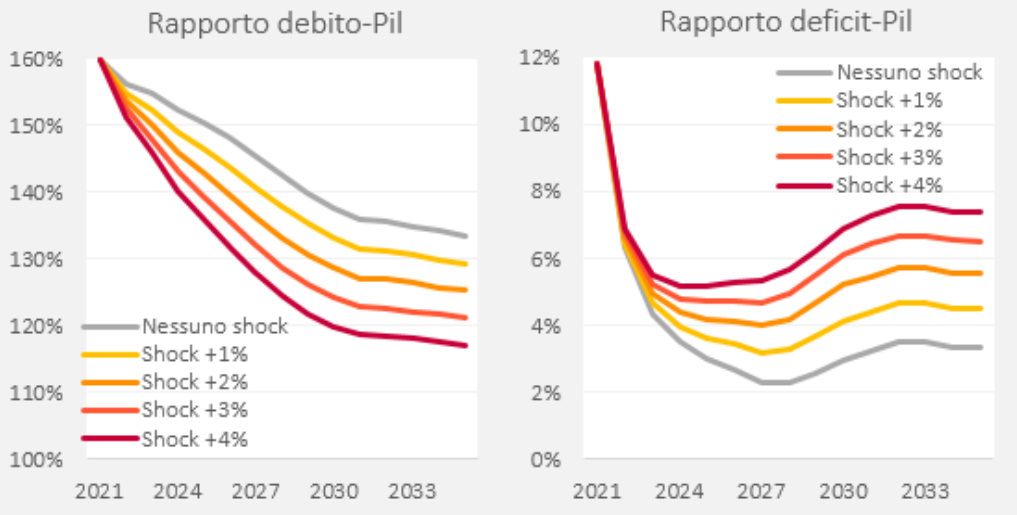
2. Debito pubblico e inflazione

Da qualche mese nell'economia mondiale si è ripresentata l'inflazione, ovvero, l' aumento del livello dei prezzi . Tutto questo si ripercuote sulla finanza pubblica e sul debito pubblico . A causa dell'inflazione, aumentano i tassi d'interesse questo implica un rapporto debito-Pil elevato. In presenza di uno shock inflattivo, i creditori domandano maggior rendimenti di fronte all'erosione del proprio capitale. Pertanto, aumentano i tassi d'interesse nominali e, questo si traduce in maggior spesa per interessi che lo Stato deve rimborsare , di conseguenza aumenta il deficit . Deficit maggiore significa che nel rapporto deficit/Pil aumenta il numeratore. Tuttavia, va detto che nel lungo

[16] Fino al 2015 in Italia la pressione fiscale era perfettamente in linea con la media degli altri paesi europei; successivamente le cose sono cambiate poichè Italia rispetto gli altri Paesi dell'UE presenta valori più alti. Nel 2016, secondo dati Istat, l'Italia presentava una bassa pressione fiscale, riportandola così a valori registrati nel 2011, quando ancora non era stata introdotta l'Imu sulla prima casa. Infatti, del 2012, primo anno di applicazione dell'imposta municipale, la pressione fiscale salì al 43,6%, la stessa cosa si verificò nel 2013, nel 2014 e 2015, la pressione si fermò al 43,3%. Nel 2016, con 'abolizione della Tasi, la pressione fiscale scese al 42,9%.

termine, se l'inflazione non incide sulla differenza tra tasso d'interesse e tasso di crescita del Pil, i due effetti si "annullano " a vicenda e questo significa che l'inflazione non pesa sul rapporto debito-Pil. Nel breve periodo, la crescita del denominatore del rapporto debito/Pil diventa conclamato, mentre l'effetto sui tassi d'interesse si manifesta solo in parte . Tutto ciò si spiega perché solitamente sono pochi i titoli di Stato indicizzati all'inflazione e con scadenza oltre l'anno. Se si presenta, dunque, improvvisamente uno shock inflattivo, il tasso d'interesse medio[17], non si adegua all'inflazione fino a quando il debito viene rinnovato attraverso l'emissione di nuovi titoli. In sintesi , l'inflazione colpisce la quota del debito pubblico non ancora rinnovata. Fino a quando il debito non sarà rinnovato ai nuovi tassi, che prendono in considerazione l'inflazione, il rapporto debito-Pil scende. Uno shock inflattivo pesa su deficit e debito. Ma si verifica anche un cambiamento nella politica monetaria. Infatti , in presenza di uno shock inflattivo la banca centrale attua una politica monetaria restrittiva aumentando i tassi di interesse reali sia nel breve termine che nel lungo periodo. Il cambiamento di politica monetaria, implica una riduzione della base monetaria in circolazione e quindi una riduzione dei profitti e necessariamente la banca centrale riduce i trasferimenti al governo, di conseguenza peggiora l'avanzo primario . Inoltre, se la banca centrale ritiene opportuno detenere meno di titoli di Stato, la conseguenza è l'aumento dello spread sui titoli a lungo termine. Di fronte ad uno shock inflattivo,anche senza cambiamenti nella politica monetaria. si manifesterebbe comunque un problema di deficit e di debito, poiché in base al Patto di Stabilità e Crescita , al momento sospeso per la situazione critica creata con il Covid, il rapporto deficit-Pil non può superare il 3 per cento. Va detto che per l' Italia anche se il livello di inflazione rimanesse intorno al 2 per cento annuo, il rapporto debito/Pil andrebbe oltre 3%.Si tratta di un obiettivo non facilmente raggiungibile (Fig. 1).

Fig. 1: Simulazioni dell'effetto di uno shock inflattivo su debito e deficit italiani



Fonte: Elaborazioni OCPI su dati DEF 2021 e MEF.

Secondo il Documento di Economia e Finanza approvato dal Consiglio dei Ministri il 6 aprile 2022, l'inflazione agisce come un taglio lineare di quasi tutte le voci di spesa, ***l'indebitamento netto della PA migliora dal 7,2 per cento del Pil nel 2021 al 5,1 per cento nel 2022.*** Confrontando il totale spese con il totale entrate, risulta evidente che l'inflazione tende a generare un miglioramento del bilancio pubblico(DEF, 2022).

In sintesi, nel breve termine l'aumento dell'inflazione comporta un aumento delle entrate rispetto alle spese e, quindi migliora il saldo primario. Ma nella realtà, a causa della crisi energetica lo Stato ha aumentato le spesa per aiutare imprese e famiglie e di questo ne ha risentito il saldo primario.

[17] Il ragionamento non cambia anche se per ipotesi i titoli di nuova emissione sono indicizzati all'inflazione.

Come abbiamo scritto sopra è evidente che l'impatto dell'inflazione sui conti pubblici dipende non solo dalla politica fiscale attuata dal governo ma anche dalla politica monetaria. Comunque, in base a delle ricerche condotte dall'OCPI l'effetto della tassa da inflazione(erosione del valore reale del debito pubblico[18]) è maggiore dell'aumento della spesa per interessi. Vi è sicuramente un impatto negativo che ha l'inflazione sui conti pubblici.

3. Le varie posizioni teoriche sulla sostenibilità ambientale

Nel 1972 Donella H. Meadows, Dennis L. Meadows, Jørgen Randers e William W. Behrens III, nel libro "The Limits to Growth" (1972), spiegavano già chiaramente che la crescita dell'economia non può basarsi sul consumo infinito delle risorse naturali, perchè le risorse sono esauribili. gli autori nel testo indicavano i seguenti parametri principali :popolazione, produzione di cibo, output industriale, inquinamento e consumo di risorse naturali non rinnovabili, che possono avere conseguenze per il pianeta e l'umanità. Secondo il loro modello nel ventesimo secolo la popolazione avrebbe avuto abbondanza di cibo pro capite e la produzione industriale pro- capite sarebbe crescita costantemente. Nel ventunesimo secolo , la produzione di cibo pro capite e la produzione industriale pro capite, avrebbero raggiunto il picco massimo, come conseguenza di ciò la crescita economica sarebbe crollata inesorabilmente per la scarsità delle risorse naturali. Dunque, si avrebbe avuto un calo demografico e l'aumento della mortalità; nella seconda metà del ventunesimo secolo la popolazione mondiale, avrebbe avuto un rallentamento nella crescita per l'inquinamento e la scarsità delle risorse. Secondo gli autori sarebbe stato opportuno modificare i comportamenti umani e migliora la conoscenza e la tecnologia, per evitare nel ventunesimo secolo la fine della crescita economica e il calo della popolazione. Per evitare, dunque, il collasso sarebbe stato necessario passare ad un 'economia sostenibile attraverso politiche efficaci e mirate. Questo era il fulcro del messaggio presente in "The Limits to Growth" (Donella H. Meadows, Dennis L. Meadows, Jørgen Randers e William W. Behrens III, nel libro "The Limits to Growth" ,1972). Si trattò di un modello rivoluzionario che non venne accettato dagli economisti del Club di Roma, anzi, duramente criticato, perché trascurava l'importanza del progresso tecnologico necessario per combattere l'inquinamento e la scarsità delle risorse e della produzione alimentare. Va riconosciuto agli autori il merito di aver portato in primo piano il problema della scarsità , in particolare la scarsità delle risorse e i problemi ambientali. Bisogna aspettare gli anni'80 per lo sviluppo dell'economia ecologica, secondo la quale il benessere non va misurato solo considerando il PIL, ma una serie di indicatori come, per esempio, il Genuine Progress Indicator. Merita, inoltre ricordare l'approccio dell'economista Nicholas Georgescu-Roege, che fu il primo negli anni '70 a collegare l'economia alla biologia attraverso la teoria bioeconomica, perchè attraverso la bioeconomia si poteva realizzare una economia equilibrata.

Secondo Georgescu-Roegen, l'economia è bioeconomia perchè considera l'esistenza dell'uomo come specie e non come individuo. Per Roegen, l'attività economica è un'evoluzione dell'attività biologica: l'essere umano ha bisogno di molte risorse naturali che purtroppo sono limitate, senza contare che il loro consumo genera scarti privi di alcun valore. Proprio per questo motivo l'uomo ha cercato di inventare e utilizzare nuovi strumenti in grado di garantire nuove forme di energia per superare la scarsità delle risorse da lui stesso generata . Secondo il modello -della bioeconomica ogni attività economica determina l'esaurimento di quantità crescenti di materia e, energia, pertanto l'obiettivo dell'economia non può essere la crescita illimitata in quanto contrasta con le leggi della natura, quindi, toglie opportunità agli esseri viventi che verranno dopo di noi. Di conseguenza non si può pensare ad una crescita economica infinita in un mondo finito. Per Georgescu-Roegen "lo sviluppo sostenibile non può in alcun caso essere separato dalla crescita economica". Georgescu-Roegen individua il seguente programma: la produzione di tutti i mezzi bellici deve essere completamente proibita; ridurre le disuguaglianze attraverso l'aiuto ai Paesi in via di sviluppo, per raggiungere un buon tenore di vita ; la popolazione dovrebbe basare il sostentamento alla sola agricoltura biologica; evitare ogni spreco energetico; incrementare il riutilizzo dei beni ; migliorare la qualità

[18] Calcolata (ex-post) come il prodotto tra il tasso di inflazione e lo stock di debito pubblico all'inizio del periodo considerato,escludendo i titoli di stato indicizzati.

della vita attraverso un maggiore e miglior utilizzo del tempo libero. Infine, Georgescu-Roegen mette in evidenza che il sistema capitalistico, pur destinato all'autodistruzione, riesce a dominare incontrastato; perché gli ecosistemi, e i sistemi sociali hanno una loro resilienza, e l'aspetto autodistruttivo, ha bisogno di tempo prima di manifestarsi. Inoltre, nel caso delle attività umane, una schiera di fenomeni di reazioni sociali fanno emergere una retroazione che agisce in direzione contraria, il che aiuta a ridurre la pressione per le situazioni potenzialmente esplosive. La bioeconomia avrà un grande seguito negli anni successivi e avrà una certa influenza sull'economia circolare.

Ricordiamo, inoltre, la teoria sulla decrescita che mette in dubbio il modo di produzione capitalistico, perchè focalizzato sulla crescita . In realtà la teoria della decrescita critica non solo il capitalismo, ma ogni forma di società basata sulla crescita, quindi anche il socialismo. Il modello della decrescita si basa su una critica estrema della crescita economica, la società ideale sarebbe quella con meno consumo e meno lavoro. La Teoria sulla "décroissance" compare per la prima volta negli anni '90 , prendendo spunto dagli studi di Georgescu-Roegen. Lo sviluppo della teoria si deve all'economista Serge Latouche. Egli ritiene che lo sviluppo, del mondo occidentale, basato sul dominio capitalistico porta a globalizzare l'economia e rinegare le tradizioni le culture locali che sono contro l'omologazione[19]. E' opportuno sottolineare che per Latouche la decrescita non significa crescita negativa: perchè sarebbe la cosa peggiore che potrebbe capitare alla società. La decrescita non va intesa come recessione, ma qualcosa che sia da stimolo allo sviluppo sostenibile. Anche lo stato stazionario e la crescita zero, non sono attuabili. Secondo l'approccio della decrescita, dunque, lo sviluppo crea danni, per superare questo limite bisogna abbandonare la crescita illimitata, che si pone come obiettivo il profitto a scapito dell'ambiente e dell'umanità. L'obiettivo della decrescita è quello di creare una società dove valori economici non siano centrali e in cui si abbandona il consumismo sfrenato. Riformulare la società su nuovi principi: la qualità della vita, le relazioni sociali conviviali, la sobrietà . In sintesi, bisogna parlare di a-crescita. Si tratta di una trasformazione basata su le 8 R[20]: rivalutare, riconcettualizzare, ristrutturare, ridistribuire, rilocalizzare, ridurre, riutilizzare, riciclare. Le proposte dei sostenitori della decrescita vanno valutate sia sul piano individuale, ovvero, impostare la propria vita sulla semplicità; ma anche sul piano globale, ovvero, realizzare un programma politico che favorisce l'economie locali interconnesse; favorisce il ritorno all'agricoltura contadina stagionale, biologica; favorisce una produttività che crea tempo libero ma anche in grado di creare posti di lavoro; ridurre lo spreco di energia; riorganizzare la ricerca scientifica e tecnologica; riformare il sistema fiscale con una maggior per le attività pericolose per l'ambiente.

Interessante è anche la tesi sulla Crescita non-economica e stato stazionario di Herman Daly[21], Egli parla di crescita antieconomica ("uneconomic growth") e di stato stazionario ("steady-state"). Secondo Herman Daly : "la crescita economica è l'obiettivo più universalmenteaccettato nel mondo: capitalisti, comunisti, fascisti, socialisti si sforzano di renderla massima; (...)mentre l'umanità sta crescendo rapidamente, l'ambiente è rimasto immutabilmente stabile nelle sue dimensioni quantitative" (Daly, 1981, The steady state). Non si può avere una crescita illimitata e la sostenibilità ambientale secondo Daly l'affermazione che "non c'è conflitto" tra economia ed ecologia è falsa (Daly,2015). Pertanto,la crescita economica determina esternalità negative, e peggiora la qualità della vita e della natura, è una crescita antieconomica. L'economia dello stato stazionario rimane l'unica strada percorribile. Precursore della teoria dello stato stazionario di Daly fu sicuramente Mill che nel libro IV dei suoi "Principi di Economia Politica" (1848), John Stuart Mill prende in considerazione le conseguenze del progresso e dello sviluppo economico dovuto alla prevaricazione dell'uomo sulla natura (Mill). Nel capitolo 6, si sofferma sullo stato stazionario. Egli sosteneva che la crescita produttiva va concentrata sui paesi più poveri mentre nei paesi ricchi diventa importante una migliore distribuzione realizzabile anche attraverso un buon sistema legislativo; è chiaro che per Mill non si può avere una crescita illimitata . Il concetto di stato stazionario di Daly ,comunque, è distante da quello classico, soprattutto perché per Daly è importante un'azione politica in grado di stabilire un'economia dello stato stazionario attraverso restrizioni nell'uso delle risorse. Per essere

[19] Si parla di deregolamentazione, la flessibilità del lavoro, di turismo predatorio tutte realtà che conducono alla deterritorializzazione.
[20] Presenti nell'economia circolare.
[21] Economista ecologico allievo di Georgescu-Roegen.

sostenibile, un'economia stazionaria non deve superare i limiti ecologici. Un'economia di stato stazionario è un'economia con uno stock costante di capitale e con una popolazione costante. Lo stato stazionario si può realizzare attraverso i seguenti punti: trasferimento fiscale: ovvero il "valore aggiunto" non più come base imponibile bensì diventa base imponibile il flusso di risorse naturali; limitare la disuguaglianza; riformare il settore bancario dare meno spazio alle banche private, più allo Stato; passare dal libero scambio e dalla libera mobilità dei capitali a un commercio internazionale regolamentato; realizzare la piena occupazione e , quindi, in condizioni di stato stazionario, i miglioramenti della produttività dovrebbero garantire una maggiore occupazione e un aumento del tempo libero; puntare su maggior tempo libero attraverso il lavoro part-time. Realizzare una società che punti alla cooperazione, senza arrivare ad un mondo senza argini e confini.

Interessanti sono anche le varie posizioni sulla post-crescita. In particolare, ricordiamo la posizione del Post Growth Institute è un'organizzazione internazionale senza scopo di lucro che sostiene la realizzazione di un mondo in cui persone e natura possono prosperare entro limiti ecologici, senza il bisogno di una crescita economica costante. In particolare, vale la pena considerare la posizione di Tim Jackson, che in "Prosperità senza crescita" (2009) analizza il modello capitalista attraverso il dilemma della crescita (Jackson). Egli ritiene che: la crescita non è sostenibile per i consumi eccessivi e per gli elevati costi ambientali e sociali; la decrescita non è sostenibile perché condurrebbe al crollo del sistema. Pertanto, quando il sistema economico manca di stabilità, la prosperità senza crescita è la strada giusta. La prosperità non va vista in termini economici , ovvero, crescita dei redditi e del PIL, infatti, il PIL, concentrandosi sui consumi presenti, non considera il vivere bene nè la prosperità. Bisogna andare oltre gli aspetti materiali. Lo Stato deve garantire prosperità e stabilire limiti ambientali, combattere il consumismo e le disuguaglianze, utilizzare un modello economico che va oltre il Pil prendendo come riferimento altri indicatori. In particolare, nell'economia bisogna garantire la prosperità ma non turbare il patrimonio ecologico, questo implica anche un miglioramento nella qualità della vita ,promuovendo tecnologie , realizzare progetti sostenibili e prevalentemente locali. Interessante è anche l'approccio conosciuto come l'economia della ciambella sviluppata da Kate Raworth che prende in considerazione sia delle problematiche ambientali e sociali, sia la crescita economica. Per Raworth l'economia dovrebbe essere rigenerativa , quindi rispettosa dell'ambiente e distributiva , ovvero, tutelare il benessere comune. Vi è una base sociale di benessere che deve essere garantita a tutti , inoltre, dovrebbe esserci anche un limite ecologico che bisogna rispettare, quindi, tenere conto del cambiamento climatico, acidificazione degli oceani, inquinamento, mancanza d'acqua, sfruttamento del suolo, perdita di biodiversità, inquinamento dell'aria, depauperamento dello strato di ozono. Solo così l'umanità può essere sicura.

Attualmente la nostra società ha superato alcuni di questi limiti planetari: cambiamento climatico, perdita di biodiversità. Allo stesso tempo, per Raworth è importante garantire alla società : cibo, salute, istruzione, reddito e lavoro, acqua potabile e , energia, reti sociali, abitazioni, uguaglianza di genere, equità sociale, voce politica e pace e giustizia. Nel mondo, una persona su nove non ha abbastanza da mangiare. Una persona su quattro vive con meno di 3 dollari al giorno e una su otto non riesce a trovare lavoro. Una persona su tre non ha ancora accesso ai servizi igienici e una su undici non ha una fonte di acqua potabile sicura. Un bambino su sei di età compresa tra 12 e 15 anni non va a scuola, la stragrande maggioranza sono ragazze. Quasi il 40 % delle persone vive in Paesi in cui il reddito non è distribuito in modo equo. Oltre della metà della popolazione mondiale vive in Paesi in cui popolazione non ha alcuna libertà nè diritti politici e civili. E' importante creare uno spazio sicuro, ovvero, una ciambella: sicura per l'ambiente e giusta per l'umanità. Solo così si può raggiungere la sostenibilità e quindi, combattere contro le disuguaglianze, e realizzare una buona vita, . E' chiaro che il benessere non può essere misurato solo tenendo in considerazione il PIL. La sfida della nostra epoca è quella di creare una società ed un'economia dove non ci sia privazione umana e degrado ambientale. Pensare ad un'economia che favorisce la prosperità umana indipendentemente se il PIL aumenti, diminuisca o rimanga stabile. E' importante pensare alla qualità dell'ambiente ma anche allo sviluppo economico, realizzare un contesto di "crescita verde, crescita qualitativa: tenendo ben distinto la crescita del PIL dall'impatto ambientale, per non limitare la crescita. La crescita verde si basa proprio sul concetto di "*decoupling*" (d*isaccoppiamento*): la crescita economica si realizza grazie alla tecnologia e alla efficienza produttiva, senza dimenticare

la sostenibilità, riducendo le emissioni. Il futuro è .la Green economy , che rappresenta un nuovo modello di sviluppo, dove è importante l'abbattimento delle emissioni di gas serra e la riduzione dell'inquinamento locale e globale. L'obiettivo e realizzare una economia moderna grazie anche, al Green Deal per fare dell'UE un'economia, efficiente e competitiva.

Conclusioni

Nel presente lavoro si è cercato di analizzare gli effetti dell' elevato debito pubblico sull'economia e come esso condizioni la politica economica di un paese. Abbiamo prima considerato il Debito Pubblico e quale siano le sue implicazioni sulla sostenibilità ambientale. Si è poi considerato la ripresa dell'inflazione, che si sta manifestando in tutte le economie avanzate, che riduce il potere di acquisto della collettività. Va detto però, che se l'inflazione è inattesa i conti pubblici migliorano, poiché diminuisce il valore reale del debito. In questa situazione lo Stato ci guadagna mentre i risparmiatori perdono. Se l'inflazione effettiva rispecchia quella attesa il risparmiatore riceverà sul risparmio un tasso di interesse elevato in questo caso aumenta anche la spesa per interessi. Nel breve periodo la spesa per interessi è bassa e non compensa la riduzione reale dei titoli di stato, di conseguenza l'effetto finale sarà una riduzione del rapporto debito/Pil. Tuttavia, nel lungo termine, quando oramai i tassi di interesse sui titoli riflettono l'elevata inflazione, la "tassa sull'inflazione" non produce alcun effetto sul rapporto debito/Pil.
Infine, ricordiamo che gli effetti sono quasi inesistenti se dietro le emissioni di titoli di Stato c' è l' acquisto da parte della BCE .
Abbiamo poi considerato aspetti legati alla sostenibilità ambientale. Benchè siano molti gli studiosi che hanno riconosciuto il ruolo importante del Pil per la crescita economica, tuttavia sono emerse anche posizioni diverse. Partendo da questo presupposto si è cercato di analizzare le diverse alternative che permettono di sviluppare il concetto della sostenibilità. I vantaggi della crescita diventano incerti quando emergono costi sociali ed ecologici. Dalla metà del XX secolo lo sviluppo economico globale ha tolto milioni di persone dalla povertà, quindi, abbiamo generazioni che conducono una vita sana e dispongono cibi per nutrirsi, acqua pulita da bere. Ma la globalizzazione ha anche determinato un forse utilizzo delle risorse naturali. Tra il 1950 e il 2021 la popolazione mondiale si è triplicata ed il Pil reale mondiale è aumentato di sette volte. C è stato un aumento degli sperperi: l'uso dell'acqua dolce si è triplicata, l'uso di energia quadruplicata, l'aumento dei fertilizzanti è aumentato di oltre 10 volte, effetto serra, acidificazione degli oceani, perdita di biodiversità. Nel 2010 le risorse utilizzate ammontavano a 72 miliardi di m3, raddoppiate rispetto il 1980 e oltre 10 volte quelle del 1900, nel 2030 si raggiungerà quota 100 miliardi di m3 (OCSE, 2015).
Dal XX secolo diversi sono i modelli economici che mettono in rilievo la sostenibilità ambientale e sociale e mettendo in secondo piano la crescita del PIL come indicatore economico. Abbiamo diversi modelli economici che mettono in discussione il dogma della crescita. Ricordiamo, per esempio, Tim Jackson in " prosperità senza crescita", la crescita non è sostenibile nelle condizioni attuali per gli eccessivi costi ambientali e sociali. La decrescita porterebbe al collasso del sistema. La via da percorrere sarebbe la prosperità senza crescita. Solitamente si considera la prosperità come crescita del Pil, ma non è così perché il Pil non considera ingegno, coraggio, saggezza, compassione, conoscenza. Il Pil considera i consumi attuali ma non il vivere bene e la prosperità, la prosperità va oltre la crescita economica ed il denaro. Lo Stato dovrebbe garantire la prosperità e non l'opulenza , prosperità che può essere garantita stabilendo limiti ambientali, stabilendo l'uguaglianza e, prendendo in considerazione un modello che va oltre il Pil, considerando altri indicatori. Secondo il modello della Ciambella di Raworth, l'economia deve essere rigenerativa rispetto l'ambiente e distributiva rispetto il benessere comune. Il Pil non più obiettivo economico, ma bisogna progettare ad una economia che promuove la prosperità indipendentemente se il Pil cresce o diminuisce o si mantiene stabile. Pensare al capitalismo naturale, green economico, economia circolare, tutto ciò che è compatibili con lo sviluppo economico verde . La società umana deve trovare un equilibrio grazie ad una interazione con l'ambiente.

Bibliografia

.

Clemente A (san) (1999), Quale ricco si salverà, Bianco M. G. (a cura di), Città Nuova, collana Testi patristici.

Climate policy initiarive (2017): Global Landscape of Climate Finance 2017.

Commissione Mondiale per l'ambiente e lo sviluppo (1988), Il futuro di noi tutti, Bompiani, Milano.

Commissione Europea , Defining "green" in the context of green finance, Rapporto finale.

Common, Stagl. 2005. "Ecological Economics". Cambridge University Press.

COM(2019) 640 final dell'11 dicembre 2019.

COM(2019) 650 final del 17 dicembre 2019.

COM(2020) 14 final del 14 gennaio 2020.

Christensen, Johan. 2018. The Power of Economists within the State. Stanford: Stanford University Press.

Daly H, (1982) Lo stato Stazionario Ed Einaudi

Documento programmatico di bilancio 2022 Ministero Dell'Economia e delle Finanze

Desrosières, Alain, 2002. The politics of large numbers: A history of statistical reasoning. Harvard University Press.

Deaton A. (2008), Income, Health, and Well-Being around the World: Evidence from the Gallup World Poll, Journal of Economic Perspectives – Volume 22, Number 2, 53–72

Di Nicola F. , Paladini R. (2017),A tax-benefit system reform for Italy, paper presented at SIEP Conference, Catania.

Dolan P., Metcalfe R. (2008), Comparing Willingness-to-Pay and Subjective Well-Being in the Context of Non-Market Goods, Centre for Economic Performance, Discussion Paper No. 0890, London School of Economics.

Georgescu-Roegen. 2003. "Bioeconomia". Bollato Boringhieri.

Istat– CNEL(2013). BES 2013 – Il Benessere equo e sostenibile.

Istat(2015). BES 2015 – Il Benessere equo e sostenibile in Italia

Istat(2017). Aspetti della vita quotidiana.

Istat(2017). BES 2017 – Il Benessere equo e sostenibile in Italia Istat (2017).

Jackson T. 2009. "Prosperità senza crescita". Ambiente.

Latouche S (2015). Breve trattato sulla decrescita serena-Come sopravvivere allo sviluppo. Bollati Boringhieri.

Meadows Donatella H, Dennis L. Meadows, Jørgen Randers e William W. Behrens (1972), The Limits to Growth

Mill, J S (1848), Principi di Economia Politica",

Massarutto. A (2019). "Un mondo senza rifiuti?". Il Mulino.

Mason P(2016). "Post-capitalismo". Il Saggiatore.

Pompò M(2021), "Etica e Finanza due realtà a confronto" in Etica , Finanza e digitalizzazione: lo scenario attuale nel mondo a cura di Vittoria Pompò, Ed Simmetria , Roma

Knox J. H., Un (2017) Special Rapporteur, Human Rights Council (2017). Biodiversity Report – 2017: Report of the Special Rapporteur on the issue of human rights obligations relating to the enjoyment of a safe, clean, healthy and sustainable environment

Krugmank P. (2010). The angry Rich, NYT, 20/9/10 Kuklys W. (2006).

Masur J., Bronsteen J., Buccafusco O C. (2010), Welfare as Happiness, 98 Georgetown Law Journal 1583 & Univedi of Chicago Law School.

Molinos M. (2016). The relationship between video game use, Internet use, addiction, and subjective well-being, California State University, Long Beach,

Nordhaus W., Tobin J. (1972),Is growth obsolete?, Cowles Foundation, Discussion Paper 319 e NBER WP 96

Okun A.M. (1975), Equality and Efficiency: The Big Tradeoff, The Brookings Institution.

Pearce e D. W. –Barbier E. B. (2000). Blueprint for a Sustainable Economy, Earthscan Publications Ltd.: London.

Roegen G. Rapporto La Finanza Etica e sostenibile in Europa. (2020), Fondazione Finanza Etica.

Rapporto (2020) Pandemie , l'effetto boomerang della distruzione degli ecosistemi , WWF

Rapporto (2020) L'Italia e gli obiettivi di sviluppo sostenibile, Asvis.

Rifkin. 2019. "Un Green New Deal Globale". Mondadori.

Salardi S. (2011), Sustainable Development: Definitions and Models of Legal Regulation. Some legal-theoretical outlines on the role of law in Rivista quadrimestrale di diritto dell'ambiente.

Smith Schoool of Enterprise and environment (2013): Stranded assets and the fossil fuel divestment campaign: what does divestment mean for the valuation of fossil fuel assets? AVailable

Schmelzer, Matthias. 2016. The hegemony of growth: the OECD and the making of the economic growth paradigm. Cambridge University Press, 2016.

Stahel. 2019. "Economia circolare per tutti". Ambiente.

ISBN: 978-2-931089-30-9

Lessons learned from the Covid-19 according to the bank's regulations by Basel Committee

Orkida ILOLLARI*
Mediterranean University of Albania - Albania

Ines KOCIAJ
Bank of Albania - Albania

Abstract: After the 2007-2008 financial crisis the Basel Committee (Supervisory board) implemented a set of new regulatory standards, known as continuous Basel reforms named Basel III. These standards mainly focused in strengthening banks regulations, supervision and risk management including credit, market & operational risk.
The Basel Committee has seen as appropriate to evaluate the effects of these standards in the behavior of the banking system. The Covid-19 pandemic has had a great impact to the credit quality of borrowers and to the public sector as it was an unexpected crisis. Meanwhile the Supervisory board has been keeping track of banks' asset quality and giving supervisory reports on banks: credit risk governance and credit risk modelling policies and practices (BIS,2022). Governors and Heads of Supervision have committed to proceed towards by reducing Covid-19 risks to the world banking system and work harder on the future direction of the Basel Committee regulations.
On March 2020, Basel Committee, published a guideline for the flexibility in the prudential framework on payments of loans. In particular they agreed to manage the risk of NPL (non-performing loans) losses by ensuring that the corporate restructuring of different firms has gone through to ensure a sound recovery. Early lessons from the Covid-19 pandemic on the Basel reforms, gives us the initial findings based on an empirical analysis of vendor and regulatory data, case studies and the results of a supervisory survey conducted by the Committee. The analysis concludes that the banking system has remained strong in the pandemic, by strengthening the capital and liquidity from the Basel accords.
According to EBA (European Banking Authority), this crisis (pandemic) calls for the importance of the high-quality regulatory framework in the EU banking sector and the new measures carried out by the committee for Basel III. The COVID-19 pandemic made us realize that not all banks have the necessary infrastructure to provide digital services. Therefore, it was necessary to identify new channels to expand the range of these services and, thus, manage the concentration of people in branches. It is crucial to be mentioned that the digitalization of the economy and the way to move towards a sustainable economy are key factors to overcome the crisis.

Keywords: Central Bank; Basel Committee; Basel III; Covid-19

JEL Classification: *E 58*

1. Introduction

Increased global health – economic threats, lockdowns, economic uncertainties, rapid closures in different sectors of the economy and the worldwide spread of corona-virus produced an alarming situation in the whole chain of the economy globally (businesses, production units,

* Corresponding Author: orkida.ilollari@gmail.com

supply chains, financial market Naeem et al (2022). Nowadays as banks are the main drivers of economy, they imply interest rates related to money demand and supply within the economy of a country and cross- countries economic relations. They have been hit harder than the other sectors because of the faster global spread of Covid-19 to the economy. Basel Committee on Banking Supervision announced a set of new regulatory standards known as Basel III after the Global Financial Crisis 2007-2009. In the same line, on March 2020 the Supervisory Board began to estimate the Covid-19 pandemic's impact on the banks, as it was considered a real pose to the Basel reforms (BIS,2020). As a significant important part of the working program, the board started from the beginning to appraise the Basel III reforms to the Covid-19 crisis and how they would impact the economy recovery.

The committee would continue to observe the impact and act in the same line with the Financial Stability Board and other standard-setting organizations. Evaluations that were made by the Committee focused on the ongoing reforms by jurisdictions. This was a way to estimate the impact of the rules implemented before to the banking system and the degree where they have achieved their target.

Similarly, as in the financial crisis of 2007-2008, the pandemic created confusions among the investors/financial partners that weren't sure for their deposits and financial investments. This situation included risks as financial risks, insolvency risk, bankruptcy risk and liquidity risk.

In this view, the role of the supervisory authorities becomes crucial as they need to balance the risk and ensure the creditworthiness of the banks where the customers' investments and deposits would be less vulnerable to financial uncertainties. (Khullar et al., 2020). The European Bank Authority mentions that the important issue was that banks would be able to lend and prevent liquidity shortages in the European market including businesses and households. The promptly downfall in economic activity linked to a sudden rise in the demand for liquidity raised concerns about businesses' abilities to immerse the shock.

The Authority published a guideline for the flexibility in the prudential framework on payments of loans.

The Basel Accords put higher capital requirements on loans that are classified as past due or defaulted. It applied higher capital requirements to loans considered as default. One criterion used in these categorizations is if the payments of the loans are past due to more than 90 days during the Covid-19 pandemic in some jurisdiction's banks can change the counting of past due days to 180 days. Another one is if whether the bank considers that the borrower cannot meet pay its credit obligations according to the rescheduled payments. The Expected Credit Losses due to the IFRS9 played a key role in the pandemic. There exist high levels of uncertainty to evaluate the expected credit losses (ECLs) and to be able to apply the International Financial Reporting Standard (IFRS9). The IFRS9 is a standard for which it is essential to use the experienced judgement. The information presented to assess the ECL is limited. Relief measures during the Covid-19 such as public guarantees or payment moratoriums, organized by government, monetary authorities or by banks voluntarily should not arise in exposures from 12-month ECL to a lifetime ECL measurement (BIS, 2020). The places where banks are to develop forecasts based on reasonable and endurable information are the Basel Standards that anticipate to reflect the great significant effect of the economic support and payment moratoriums especially by the public authorities.

The committee decided that different jurisdictions might give permission to the banks to switch from static approach to the dynamic approach. The Basel Committee has decided that the assessment for these clients should be predicted on the possibility of payment amounts after the moratorium period ends. Thus, the committee has also consented that when borrowers agree with the terms of the payment moratorium (public or granted by banks on a voluntary basis) they should not be immediately categorized as loans forgone. (BIS, 2020). In particular they agreed to manage the risk of Non Performing Loans (NPL) losses by ensuring that the corporate

restructuring of different firms has gone through to ensure a sound recovery. These are consistent in the perspective to map out standards, in the same line with the Basel Committee and the engagement with the crucial counterparts on methodological approaches, analytical issues, data collection and interpretation of findings (BIS, 2021). In the same way, researchers at the Bank for International Settlements, monetary authority, governments, supervisory authorities and external academics have assisted in remodeling the quality of analysis and data which brings an independent judgement of the assessment work.

In addition, Basel Supervisory Board decided to create a TFE (Task Force on Evaluations) on evaluating the impact of Basel III framework (BIS, 2021). Capital requirements in the form of Common Equity Tier 1 (CET1) capital ought to increase after the GFC (Great Financial Crisis). Capital requirements have risen in order to help banks resist in time of crisis. A considerable attempt is put on the Common Equity Tier 1 by increasing it.

The risk-weighted framework has been changed to strengthen risk capture and help comparability in banks' capital ratios such as the leverage ratio which decrease excess leverage ratio in the banking system. It has considerably been changed from the analysis of the systemically important banks that have provided system wide risks factors. Macro prudential elements such as the Liquidity Coverage Ratio (LCR) and the Net Stable Funding Ratio (NSFR) help in reducing excessive liquidity risk and maturity. Moreover, some part of the Basel Accords as leverage ratio and net stable funding ratio (NSFR) have not been fully implemented by the bank members.

The continuing assessment will take place as members apply these standards.G20 Leaders and Group of Central Bank Governors and Heads of Supervision (GHOS) have insisted in completing the implementation of the full and consistent Basel III standards. By doing this there can be applied help to evaluate the benefits of the committee standards that banks need to face future global crisis.

The arrangements of the Basel III framework should be found on theoretical and empirical analysis where needed. Thus, by concluding the findings better policy responses can be decided.

Basel III accord was marked as "a clear end to the post-GFC Basel III policy agenda" and "further potential adjustments to Basel III will be limited in nature and consistent with the Committee's evaluation work" (BIS,2021).

2. The Method

The main framework of Basel III is shaped after the Great Financial Crisis The first one to receive information is the Task Force on Evaluations (TFE) survey questionnaire which includes data for capital buffers, liquidity buffers and leverage ratio. It will focus on the assessment of all the Basel III standards. The TFE is inspecting the flexibility of the banking sector during the Covid-19 and the main aspects of the Basel III standards as: (i) banks' use of capital buffers and our member jurisdictions' experience with the countercyclical capital policies; (ii) the impact of the leverage ratio on financial intermediation; (iii) the usability of liquidity buffers; and (iv) the (pro) cyclicality of specific Basel capital requirements. (BIS, 2021).There are also 3 case studies including countries such as United States, United Kingdom and Mexico.

The report "Early lessons from the Covid-19 pandemic on the Basel reforms", gives us the findings based on an empirical analysis of vendor and regulatory data, TFE questionnaires, case studies and the results of a supervisory survey conducted by the Committee. The regression model is used to estimate the relationship between banks' regulatory measures and changes in CDS spreads during the pandemic.

Bank regulatory ratios include used as explanatory variables are CET 1 capital ratio; the leverage ratio and the LCR (liquidity capital ratio). The data includes 83 banks in the Committee

member jurisdictions' and the three regulatory ratios (i.e. CET1 ratio, leverage ratio and LCR and control variables are available.) (BIS, 2021). Regression specifications with the differences in Credit Default Swap (CDS) Spread as the dependent variable.

3. Results - Discussion

The analysis concludes that the banking system has remained strong in the pandemic, by strengthening the capital and liquidity from the Basel accords. There is no evidence that any international bank has gone bankrupt or has required public sector debt funding, but future losses can be unexpected as the crisis is ongoing. The banking sector has managed to deal with the increase in costs of liquidity and higher credit risk, but providing constantly services to their customers. Regression results show that banks with higher Common Equity Tier 1 (CET1) capital ratios had smaller increase in credit default swap spreads. CDS spreads decreased more for banks that were more profitable before the pandemic crisis, in terms of ROA. CDS soared more for banks that relied more on short-term funding. In addition, the report suggests that more resilient capitalized banks show slightly greater increase in lending to businesses and households than other banks. As a result, the world banking system has been positive to achieve and support government and monetary authorities' attempts to maintain an economic activity, by helping in confronting and absorbing the shock rather than escalating it as in 2007-2009 crisis. Firstly, the usability of capital buffers and price movements of additional tier 1 capital instruments in the article indicate that banks that had less headroom (i.e. the amount of capital resources above minimum capital regulatory requirements and buffers) needed to lend less during the Covid-19 than those with a greater headroom. The Capital conservation buffer (CCoB) was presented so that banks could have a supplemental unit of usable capital.

The buffer is set to be 2.5% of the total risk-weighted assets (RWA) (BIS,2011). It can be decreased during an economic downfall to help banks to keep their flow of credit in the economy. Global systemically banks have additional capital buffers to decrease the possibility and impact of the economic distress and bankruptcy. The level of the buffer depends on the bank's systemic importance. The Domestic systemically important bank (D-SIB) capital's buffer focus more on the effect to the domestic economy. These banks can be obliged to have higher capital buffers due to the importance in the domestic economy. In putting D-SIB buffers, Basel III requires national discretion to adjust structural characteristics of the domestic economy's financial system. Hence, D-SIB methodologies and the level of buffers are different across economic jurisdictions. Capital buffers also illustrate that a bank's overall capital can be sufficient to its risks.

The Supervisory Board declared in 2019 that capital buffers can be used in times of stress by having an additional overlay of capital. Market Stigma, Uncertainty about the future, supervisory response and other factor can put the "buffer" in use. Bank which their capital levels are closer to their buffers have a higher probability to cut lending, that can be interpreted as a hesitation to use "buffers".

This hesitation can be considered the bank's uncertainty of potential financial loss or the market stigma "what would happen if the bank operates in its buffers and for how long".

The use of capital buffers offers more lending opportunities to the real economy so that they can help the effect of the Covid-19 tsunami and decrease the possibility that a transitory shock can have perpetual consequences to banks' stability and the global economy. Therefore, if the Covid-19 crisis continue to grow, banks will have lower buffers to the future shocks the chance for future vulnerabilities will soar. Policy makers and supervisors should be careful when banks are using capital buffers and can implement stress-test results to reassess forward looking bank capital plans (BIS,2021). Secondly, liquidity buffers changes depending on banks' funding models.

Banks involved in unsecure money market were likely to have pressure in funding sources and experience large draws on loan facilities. Whereas banks with stable deposits experienced less liquidity pressure even at the peak of stress. An addition in the amount of high-quality liquid assets that the liquidity coverage ratio requires banks to help by sponging this liquidity pressure due to the measures from central banks and governments which supported economies by reducing liquidity pressures.

Meanwhile a rise in the amount of high liquidity assets as the Liquidity Coverage Ratio (LCR) needs, rules taken by the central banks and governments to support economies decreased the liquidity stress. Because banks experienced large drawdown demand on committed credit lines they engaged in buybacks of financial instruments from money market. Although banks entered the Covid-19 pandemic with better capital and liquidity ratios as of GFC, loan demand from households and corporates escalated during the crisis. Bank lending rose during pandemic financed by public loan guarantees.

The moderation of provisioning rates, the capital composition measures, loan guarantees and measures by regulators emerged in capital ratios thus increase in lending growth continued. Thirdly, the impact of the leverage ratio on financial intermediation in some countries exempted central bank reserves from the leverage ratio calculation, which eased banks' balance sheet constraints on their intermediation activity.

The other initial assessment was concentrated on the infrastructure finance known as project debt financing (i.e. loan and bonds). The G20 reforms on the infrastructure finance have had a slightly small impact to the macro-financial market, government policy and institutional factors. In a nutshell, the effects of Basel III capital and liquidity requirements were not costly in the infrastructure finance. It was also noticed that the global systemically important banks (G-SIBs) rules brought to shorter maturities of infrastructure loans. The reforms were implemented by purpose as one of the main objectives of the Basel III framework was to diminish the mismatch on bank balance sheets.

Finally, the cyclicality of specific Basel capital requirements examines the cyclicality (defined as the extent to which regulatory requirements respond in the opposite direction to movements in economic activity) of credit loss provisions as mentioned before similar to NPL and market risk requirements on capital during the pandemic.

The analysis argues that the governments' support measures to borrowers had diminished the impact of the economic contraction on bank capital. (BIS,2021). In relation to credit risk, the governmental support measures and payment moratorium programs together with the Committee's guidance to ensure that the risk- mitigation actions are reflected in banks' capital requirements, thus to explain better the impact of the economic contractions on the banks' capital positions.

4. Conclusions

In general, the size and scope of the Covid-19 pandemic in comparison to the Great Financial Crisis of 2007-2009 show that no banks will be left intact. The initial market reaction was a shakeout to a number of banks because everything happened fast. An attempt for modest stabilization made better capitalized and more profitable banks value their balance sheets. However low profitability banks remain very tight. Financial markets especially banks remain alert for the long term prospects in the banking sector, in particularly in its riskiest segments. The Committee's work program from the beginning of pandemic and during 2021-2022 includes three main points: supporting Covid-19 flexibility, durability and recuperation; evaluating and diminishing risks and vulnerabilities of banks especially those proceeding from technology and climate change; and the last but most important strengthen the supervision coordination and

practices. Remarkably, well capitalized banks experienced a more solid recovery to poorly capitalized banks. Therefore, financial markets recompensed bank robustness.

The Supervisory Board of Basel III related task will center on controlling and monitoring the full and consistently implementation of Basel III regulations by the all members and completing the assessment of the effectiveness of the reforms. The article showed that the increased quality and higher levels of capital and liquidity held by the banking sector has assisted to absorb the sizeable impact of Covid-19 crisis, implying that Basel reforms have accomplished their objective of strengthening the resiliency of the banks. The whole banking system would have faced greater stress if the Basel reforms would not have been implemented.

Throughout the unprecedented global economic downturn the banking system will continue to perform its fundamental functions, as banks have continued to provide credit and other critical services. Banks 'capital and liquidity positions remained solid and have not been remarkably influenced by the pandemic crisis, due to the monetary and fiscal measures in different countries to support the economy. Although some banks accomplished pressure at the beginning of the pandemic, where the market liquidity plummeted and bank funding cost decreased, no systematically bank failed or needed seriously public funding debt. As it is previously discussed the banking sector has kept its provision of loans and other financial critical services to individuals and businesses due to the support of public authorities.

In spite of difficulties across some regions, banks were able to provide the liquidity needs for the market throughout the crisis.

References

1. Abboud, Alice, Elizabeth Duncan, Akos Horvath, Diana Iercosan, Bert Loudis, Francis Martinez, Timothy Mooney, Ben Ranish, Ke Wang, Missaka Warusawitharana, and Carlo Wix (2021). "COVID-19 as a Stress Test: Assessing the Bank Regulatory Framework," Finance and Economics Discussion Series 2021-024. Washington: Board of Governors of the Federal Reserve System, https://doi.org/10.17016/FEDS.2021.024.
2. Avdjiev, S, A Kartasheva, B Bogdanova, P Bolton and W Jiang (2020): "CoCo issuance and bank fragility", Journal of Financial Economics, forthcoming.
3. Barua, B., & Barua, S. (2021). COVID-19 implications for banks: evidence from an emerging economy. SN Business & Economics, 1(1), 1-28.
4. Basel III Monitoring Report. The Bank for International Settlements. (2022, September 30). https://www.bis.org/bcbs/publ/d541.htm
5. Berger, A. N., Demirgüç-Kunt, A., Moshirian, F., & Saunders, A. (2021). The way forward for banks during the COVID-19 crisis and beyond: Government and central bank responses, threats to the global banking industry. Journal of Banking & Finance, 133, 106303.
6. BIS (2020). Measures to reflect the impact of Covid-19. Basel Committee on Banking Supervision, Bank for International Settlement. Retrieved from https://www.bis.org/bcbs/publ/d498.pdf.
7. Board, F. S. (2011). the Basel Committee on Banking Supervision. Assessment of the macroeconomic impact of higher loss absorbency for global systematically important banks," Basel, 1-39.https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8418321/
8. Bogdanova, B, I Fender and E Takáts (2018): "The ABCs of bank PBRs", BIS Quarterly Review, March. Drehmann, M, M Farag, N Tarashev and K Tsatsaronis (2020): "Buffering Covid-19 losses – the role of prudential policy", BIS Bulletin, no 9, April.
9. Covid-19 and the Basel Framework: Initial Conclusions - Bde. (n.d.). https://www.bde.es/f/webbde/GAP/Secciones/SalaPrensa/IntervencionesPublicas/Gobernador/Arc/Fic/hdc210921en.pdf
10. De Bruin, Y. B., Lequarre, A. S., McCourt, J., Clevestig, P., Pigazzani, F., Jeddi, M. Z., Colosio, C., Goulart, M. (2020). Initial impacts of global risk mitigation measures taken during the combatting of

the COVID-19 pandemic. Safety science, 128, 104773. https://www.sciencedirect.com/science/article/pii/S0925753520301703

11. Early lessons from the covid-19 pandemic on the basel reforms. The Bank for International Settlements. (2021, July 6). https://www.bis.org/bcbs/publ/d521.htm
12. Hernandez de Cos, P. (2021). Evaluating the effectiveness of Basel III during Covid-19 and beyond.
13. Karim, S., Akhtar, M. U., Tashfeen, R., Raza Rabbani, M., Rahman, A. A. A., & AlAbbas, A. (2022). Sustainable banking regulations pre and during coronavirus outbreak: the moderating role of financial stability. Economic Research-Ekonomska Istraživanja, 35(1), 3360-3377
14. Minimum capital requirements for market risk. The Bank for International Settlements. (2019, January 14). https://www.bis.org/bcbs/publ/d457.htm

ISBN: 978-2-931089-30-9

Il Piano per la transizione ecologica: verso un nuovo approccio culturale ai temi della sostenibilità

Giovanna MASTRODONATO*
Università di Bari Aldo Moro - Italy

Abstract: This paper aims to analyze the Plan for Ecological Transition (approved on March 8, 2022) which seems to initiate an extensive reflection on the theme of ecological transition, not only on the actual technical level, but also in its important cultural and socio-economic implications, which deserve deepening in the national debate. The Plan emphasizes that "speaking of ecological transition today necessarily means broadening the perspective and evaluation criteria, without either or or by, framing the indicators of economic progress with environmental and social ones". All this also by extending the reference horizon to the next generations.
The profile concerning cultural development is contained in a focus entitled "a cultural revolution" - the ecological transition must ensure that every action becomes 'natural', in the sense that it is simple and convenient in respectful relations between Homo sapiens and the planet he lives on and which he will hand over to future generations. In fact, the condition for the success of the ecological transition is to have the human capital capable of dealing with the emergence of new and different situations from those hypothesized, capable of adapting the transition process to the new conditions, without changing its aims and strategic objectives.
Transilience and multidisciplinarity seem to be the new diktats that guide the new cultural revolution to achieve the goals of sustainability. In fact, increasingly interdisciplinary education, integrating humanistic and scientific knowledge, will have to allow new generations to develop the skills in digital and new technologies necessary to manage complex systems, revisiting past traditions and experiences to involve all generations.
The circle closes with the reference also to sociological aspects: "the effort to be made towards a more sustainable future involves risks and opportunities, but it wants to be fair and under the banner of a fundamental principle: 'No one should be left behind'". Not only that: the transition towards climate neutrality, digitization and the new demographic, economic and social realities that will emerge intends to be a process shared and supported by Italian and European citizens with their active participation.
If it wants to aspire to success, the Plan must include ambitious social economic targets in its horizon and indicate the way to reach them: greater solidarity between generations; gender equality; enhancement of young people; overcoming territorial gaps; jobs and better living conditions; quality education, training and innovation; adequate social and health protection ".

Keywords: sustainability, ecological and cultural transition

1. Premessa.

Questa breve relazione prende spunto dall'analisi di un documento – nella fattispecie il Piano per la Transizione Ecologica (approvato lo scorso 8 marzo 2022 dal CITE, Comitato interministeriale per la transizione ecologica) - che sembra possa stimolare il dibattito fra studiosi e

* Corresponding Author: giovanna.mastrodonato@uniba.it

avviare una riflessione estesa sul tema della transizione ecologica, non soltanto sul piano tecnico effettuale, ma anche nelle sue importanti implicazioni culturali e socioeconomiche, che meritano di sicuro un approfondimento e che sortirà conseguenze positive anche in relazione al tema della parità di genere.

Il Piano persegue specificamente lo scopo di offrire un inquadramento generale sulla strategia per la transizione ecologica italiana, definendo un quadro concettuale anche per gli interventi previsti dal Piano nazionale di ripresa e resilienza (PNRR).

Si tratta di un nuovo strumento di programmazione nazionale che è stato concepito con l'istituzione dello stesso ministero della Transizione ecologica e del Comitato interministeriale della transizione ecologica in attuazione di quanto disposto dalla legge 22 aprile 2021, n. 55.

Il Piano per la transizione ecologia dovrà coordinare le seguenti politiche:

a. riduzione delle emissioni di gas climalteranti;
b. mobilità sostenibile;
c. contrasto al dissesto idrogeologico e al consumo del suolo;
d. risorse idriche e relative infrastrutture;
e. qualità dell'aria;
f. economia circolare.

Nelle sue premesse, il Pte enuncia l'intenzione di perseguire un approccio sistemico, caratterizzato da una visione olistica e integrata, che include la conservazione della biodiversità e la preservazione dei servizi ecosistemici, integrando la salute e l'economia e perseguendo la qualità della vita e l'equità sociale.

2. Brevi cenni sul processo di transizione ecologica. Il concetto di transizione ecologica e impatto sull'ordinamento giuridico.

La transizione ecologica non sembra essere definita nei documenti ufficiali, né nei tempi, né nelle modalità, né nell'oggetto: ciò che è invece chiaro è che un modello economico finalizzato all'accrescimento della competitività, dell'occupazione e anche della creazione di *green jobs*[1].

Il concetto di transizione ecologica «costituisce uno dei perni essenziali del cd. diritto della ripresa»[2] e sembra essere divenuto il tema al centro del dibattito pubblico, nazionale ed europeo, inoltre esso «impatta direttamente sull'amministrazione (oltre che sugli altri poteri dello Stato): nell'ordinamento nazionale l'amministrazione di vertice preposta alla tutela dell'ambiente, il vecchio Ministero dell'Ambiente e della Tutela del Territorio e del Mare, ha assunto la denominazione di "Ministero della Transizione Ecologica" (tuttavia dal 22 ottobre 2022 il Ministero ha assunto il nome di "Ministero dell'ambiente e della sicurezza energetica"); una delle missioni del Piano Nazionale di Ripresa e Resilienza…s'intitola "Rivoluzione verde e transizione ecologica"…esiste da quest'anno un importante strumento di programmazione amministrativa intitolato "Piano di transizione ecologica",…è stato istituito nel diritto nazionale un "Comitato per la transizione ecologica"; un decreto legge viene denominato convenzionalmente come "decreto transizione ecologica"» .

Per cercare di inquadrare "temporalmente" la transizione ecologica, può dirsi che si tratta di quella che potrebbe essere definita come la terza tappa dei rapporti tra sviluppo ed ambiente: si sostanzia in un'evoluzione sia rispetto alla prima tappa in cui la produzione non aveva nessun tipo di limitazione di tipo ambientale e cioè l'economia lineare, - contraddistinta dallo spreco ad libitum di materie prime - sia rispetto alla seconda tappa in cui finalmente la tutela dell'ambiente emerge, ma sembra costituire un interesse antagonista (*green economy*). Al contrario, e

[1] Cfr. il prezioso lavoro di F. De Leonardis, *La transizione ecologica come modello di sviluppo di sistema: spunti sul ruolo delle amministrazioni*, in *Dir. amm.*, 2021, p. 779.

[2] F. De Leonardis, *La transizione ecologica come modello di sviluppo di sistema: spunti sul ruolo delle amministrazioni*, cit.

molto più significativamente per la tutela dell'ambiente, la terza tappa, quella della transizione ecologica, «è quella in cui l'interesse ambientale non è in rapporto di antagonismo ma di compatibilità, di composizione o, addirittura, di convergenza con lo sviluppo. Si è passati dall'economia lineare, basata sullo spreco delle risorse, all'economia circolare, dove nulla viene sprecato e tutti i materiali tendenzialmente vengono reimmessi nel processo produttivo.

Dal PNRR appare chiaramente che la transizione ecologica è, dunque, un modello economico *in primis* (ma non solo) finalizzato ad accrescere la competitività del sistema produttivo di beni e di servizi e ad incentivare nuove attività imprenditoriali e occupazione».

Gli studiosi che se ne sono occupati hanno individuato generalmente nella locuzione "transizione ecologica" un insieme di azioni rivolte alla sostenibilità dell'economia, per favorire il passaggio da un sistema basato sulle fonti energetiche inquinanti a un modello virtuoso incentrato sulle fonti verdi.

Questo processo richiede naturalmente ingenti investimenti e politiche ambientali e di sviluppo, con lo scopo di raggiungere la neutralità climatica.

Per tal via la conversione energetica che si sta avviando in tutto il mondo viene coordinata a livello continentale dall'Unione europea, che ha stabilito gli obiettivi comuni tramite il *New Green Deal*, un programma adottato nel dicembre 2019 volto al perseguimento dello sviluppo sostenibile e all'azzeramento delle emissioni di gas serra entro il 2050, con *target* intermedi per la riduzione dell'impronta di carbone previsti per il 2030.

La transizione richiede un approccio strategico, con investimenti pubblici e privati di lungo termine per essere in grado di sfruttare le energie *green* in modo efficiente. In particolare, serve uno sviluppo sostenibile dell'intera società, per evitare disuguaglianze e consentire a tutti di beneficiare dei vantaggi offerti da un'economia più pulita e inclusiva.

Quanto alle finalità della transizione, può dirsi che essa risulta assai preziosa anche perché individua una definizione comune di attività economiche sostenibili, con l'effetto, tra gli altri, di aumentare la trasparenza sui mercati finanziari e – quindi – combattere il fenomeno crescente del *greenwashing*, ossia l'ecologismo di facciata.

In realtà, in relazione ai criteri utili ad individuare le attività economiche sostenibili, inizialmente per identificare le attività economiche green venivano utilizzati essenzialmente sei criteri: mitigazione del cambiamento climatico; adattamento ai cambiamenti climatici; uso sostenibile e protezione delle risorse idrologiche e marine; transizione verso un'economia circolare; riciclo dei rifiuti; infine prevenzione e controllo dell'inquinamento e protezione di ecosistemi sani.

In altre parole, per essere considerata sostenibile, un'attività doveva contribuire – in modo significativo – ad almeno uno di questi obiettivi e non causare danni significativi all'ambiente.

Prima ancora del piano internazionale ed europeo, tuttavia, sembra non vi siano dubbi sulla necessità che la transizione ecologica debba partire dalle persone, da un rinnovato stile di vita che dovrà rispettare l'Accordo di Parigi sui cambiamenti climatici e gli ambiziosi obiettivi stabiliti dall'Unione europea per il 2030, ovvero: ridurre del 55% le emissioni di gas a effetto serra, raggiungere almeno il 32% di quota di energia rinnovabile, incrementare l'efficienza energetica di almeno il 32,5%, andare verso un'Ue ad impatto zero sul clima entro il 2050, ossia verso quella che viene definita "*Carbon Neutrality*".

In particolare, la transizione ecologica risulta senza dubbio la cornice all'interno della quale si collocano i nuovi obiettivi di economia circolare, che – seppure *prima facie* appaia limitata al settore dei rifiuti – prevede una rivoluzione epocale nei consumi, nei sistemi di produzione e di commercio dei beni.

Del resto, non si può concepire una transizione ecologica senza una transizione economico-sociale e culturale, anche in linea con gli obiettivi di sviluppo sostenibile previsti da Agenda 2030.

Infatti tutti i pilastri previsti dal PNRR devono poggiare su un principio inderogabile: "non arrecare un danno significativo". Secondo quanto espressamente previsto dall'art. 5 del Regolamento europeo n. 241 del 2021, *Recovery and Resilience Facility*, c.d. RRF, i finanziamenti

del PNRR possono sostenere esclusivamente misure che non arrecano un danno significativo all'ambiente. Tutte le misure inserite nei PNRR di ciascuno Stato membro, che siano investimenti o riforme, devono essere conformi a tale criterio, indicato anche con l'acronimo DNSH (*Does Not Significantly Harm*).

Il principio DNSH è connesso alla scelta di fondo, lanciata già prima della pandemia, che sorregge il "*Green deal europeo*". Infatti, il primo atto della transizione verde è *l'European Green Deal*, emanato nel dicembre 2019, come si è già accennato, ben prima della crisi pandemica.

Nell'ambito del PNNR, la missione 2 "*Rivoluzione Verde e Transizione Ecologica*" si propone di realizzare la transizione verde ed ecologica della società e dell'economia, per rendere il sistema "sostenibile", garantendone al tempo stesso la competitività.

3. Il piano per la transizione ecologica e la rivoluzione culturale che ne conseguirà

Il D.L. n. 22/2021 ha anche provveduto all'istituzione, presso la Presidenza del Consiglio dei ministri, di due Comitati interministeriali con funzioni di coordinamento amministrativo. A supporto della c.d. rivoluzione verde viene istituito il Comitato interministeriale per la transizione ecologica (CITE) con il compito di assicurare il coordinamento delle politiche nazionali per la transizione ecologica e la relativa programmazione. Il CITE, presieduto dal Presidente del Consiglio dei ministri, è composto dai Ministri della transizione ecologica, dell'economia e delle finanze, dello sviluppo economico, delle infrastrutture e della mobilità sostenibili, del lavoro e delle politiche sociali e, infine, delle politiche agricole, alimentari e forestali.

Sotto il profilo delle attribuzioni, l'attività principale del CITE dovrà sostanziarsi nell'approvazione del Piano per la transizione ecologica, finalizzato a coordinare le politiche in materia di riduzione delle emissioni di gas climalteranti; mobilità sostenibile; contrasto del dissesto idrogeologico e del consumo del suolo; mitigazione e adattamento ai cambiamenti climatici; risorse idriche e relative infrastrutture; qualità dell'aria; economia circolare; bioeconomia circolare e fiscalità ambientale, inclusi i sussidi ambientali e la finanza climatica e sostenibile.

A questi fini, dovranno essere individuate le azioni, le misure e le fonti di finanziamento del Piano, nonché le amministrazioni competenti per la sua attuazione. Una volta approvato il Piano, il CITE dovrà provvedere a monitorare l'esecuzione del medesimo, ad aggiornarlo e ad adottare tutte le iniziative idonee a superare eventuali ostacoli e ritardi. Il CITE si presenta dunque come una utile struttura volta ad assicurare il coordinamento dell'attività amministrativa di esecuzione del processo di transizione ecologica, costituendo momento fondamentale di raccordo tra il Ministero della transizione ecologica, la Presidenza del Consiglio e gli altri dicasteri di volta in volta interessati. Il monitoraggio circa la corretta attuazione delle politiche ambientali da parte di tutti gli attori coinvolti e la possibilità di intervento durante la fase esecutiva costituiscono infatti elementi dispensabili per assicurare il conseguimento degli obiettivi posti dal PNRR.

L'intervento normativo che ha condotto all'istituzione del MITE e del CITE rappresenta una tappa molto importante del lungo e faticoso percorso di affermazione del principio europeo di integrazione ambientale3, la quale potrà indubbiamente contribuire a ridefinire le dinamiche che hanno tradizionalmente caratterizzato la logica dell'intervento giuridico a presidio dell'ambiente in rapporto agli altri interessi tutelati dall'ordinamento. Sebbene non si sia assistito - come nell'ordinamento francese - alla formale integrazione organizzativa di tutte le principali politiche pubbliche impattanti sull'ambiente (trasporti, agricoltura, infrastrutture), lo stesso spostamento del "baricentro funzionale" del Ministero per la Transizione ecologica dal bene giuridico "ambiente"

[3] Cfr. A. Moliterni, *Il Ministero della transizione ecologica: una proiezione organizzativa del principio di integra-zione?*, in *Giornale di dir. amm.*, 2021, p. 439.

al processo dinamico della "transizione ecologica" dovrà comunque favorire l'attivazione di un percorso di progressiva ricomposizione della prospettiva ecologica all'interno di ogni futura attività di programmazione delle attività economiche e di pianificazione e governo del territorio, con conseguente superamento dell'idea che la questione ambientale assuma rilievo essenzialmente in sede di concreto accertamento di eventuali impatti "negativi".

Il nuovo Ministero dell'ambiente e della sicurezza energetica probabilmente apporterà modifiche a questo percorso, così come appena illustrato, in ragione della volontà, dichiarata, di procedere all'accostamento delle fonti fossili accanto alle ormai irrinunciabili energie rinnovabili.

Il documento resta comunque fondamentale per l'inquadramento generale che esso offre sulla strategia per la transizione ecologica italiana, realizzando un quadro concettuale volto ad accompagnare gli interventi del piano nazionale di ripresa e resilienza (PNRR).

Quanto alle scelte presenti nel piano si sottolinea che «parlare di transizione ecologica oggi significa necessariamente allargare prospettiva e criteri di valutazione, senza *aut aut*, inquadrando gli indicatori di progresso economico con quelli ambientali e sociali». Il tutto anche ampliando l'orizzonte di riferimento alle prossime generazioni.

Il Piano pone l'accento sul profilo riguardante lo sviluppo culturale in un *focus* intitolato "una rivoluzione culturale" - «la transizione ecologica dovrà far sì che ogni azione divenga 'naturale', nel senso che risulti semplice e conveniente nelle relazioni rispettose tra *Homo sapiens* e il pianeta in cui vive e che consegnerà alle future generazioni. Condizione per il successo della transizione ecologica è disporre infatti del capitale umano in grado di affrontare l'emergere di situazioni nuove e diverse da quelle ipotizzate, capace di adattare il processo di transizione alle nuove condizioni, senza mutarne le finalità e gli obiettivi strategici».

Transilienza e *multidisciplinarietà* sembrano le nuove parole d'ordine che guidano la nuova rivoluzione culturale per raggiungere gli obiettivi della sostenibilità. Infatti, l'educazione sempre più interdisciplinare, integrando conoscenze umanistiche e scientifiche, dovrà permettere alle nuove generazioni di sviluppare le competenze nel digitale e nelle nuove tecnologie necessarie per gestire i sistemi complessi, rivisitando le tradizioni ed esperienze passate per coinvolgere tutte le generazioni.

Il cerchio si chiude con il richiamo anche ad aspetti sociologici: "lo sforzo da compiere verso un futuro più sostenibile comporta rischi e opportunità, ma vuole essere giusto e all'insegna di un principio fondamentale: '*Nessuno deve essere lasciato indietro*'".

Non solo: la transizione verso la neutralità climatica, la digitalizzazione e le nuove realtà demografiche, economiche e sociali che emergeranno intende essere un processo condiviso e sostenuto dai cittadini italiani ed europei con la loro partecipazione attiva.

Se vuole aspirare al successo il Piano deve includere nel suo orizzonte dei *target* economico sociali ambiziosi e indicare la strada per raggiungerli: maggiore solidarietà tra generazioni; parità di genere; valorizzazione dei giovani; superamento dei divari territoriali; posti di lavoro e migliori condizioni di vita; educazione, formazione e innovazione di qualità; protezione sociale e sanitaria adeguata".

Tornando al Piano per la transizione ecologica e ai suoi macroobiettivi, il Piano sembra ben integrarsi con il Piano nazionale di ripresa e resilienza (PNRR) e coordina, integrandole con la digitalizzazione e la transizione energetica, le politiche ambientali che porteranno, attraverso un cronoprogramma di misure e di azioni, alla trasformazione del sistema Paese al fine di renderlo capace di centrare gli obiettivi fissati a livello internazionale ed europeo al 2050, consentendo la ripartenza e il rilancio della competitività italiana sia nel contesto europeo che mondiale. Il PTE prevede di agire su più macro-obiettivi condivisi a livello europeo:

1) Neutralità climatica, intesa come il processo di azzeramento delle emissioni di origine antropica di gas a effetto serra fino allo zero netto nel 2050, in particolare attraverso la progressiva uscita dalle fonti fossili e la rapida conversione verso fonti rinnovabili nella produzione di energia, nei trasporti, nei processi industriali, nelle attività economiche, negli usi civili e sollecitando la transizione verso un'agricoltura e una zootecnia

sane, rigenerative e circolari secondo la strategia europea "*Farm to fork*", "dal produttore al consumatore"; contrastare efficacemente gli incendi boschivi, introducendo misure per impedire il pascolo degli animali da allevamento nei terreni precedentemente boscati, distrutti da incendi.

2) Azzeramento dell'inquinamento, cioè portare l'inquinamento sotto le soglie di attenzione indicate dall'Organizzazione mondiale della sanità, verso un sostanziale azzeramento, per beneficiare la salute umana e gli ecosistemi; incentivare la mobilità sostenibile non solo per completare l'opera di decarbonizzazione e disinquinamento delle aree urbane ed extraurbane, ma anche per contrastare la congestione, ridurre la frequenza degli incidenti e promuovere l'attività fisica dei cittadini.
3) Adattamento ai cambiamenti climatici: consistente nell'azione volta a rendere operative le diverse misure di adattamento ai cambiamenti climatici che stanno già producendo delle conseguenze sul territorio, sulla biodiversità e sulle diverse attività economiche. Sulla falsariga del *Piano nazionale di adattamento ai cambiamenti climatici* (2018), si propongono quindi interventi di contrasto ai dissesti idrogeologici in atto, e per aumentare la resilienza dei sistemi naturali e antropici, e delle risorse idriche, anche attraverso l'azzeramento del consumo di suolo.
4) Ripristino della biodiversità e degli ecosistemi, che, in collegamento con gli obiettivi di mitigazione e adattamento, propone di potenziare il patrimonio di biodiversità nazionale con misure di conservazione (aumento delle aree protette terrestri e marine), e di implementazione di soluzioni basate sulla natura ("*nature based solutions*") al fine di riportare a una maggiore naturalità aree urbane, degradate e ambiti fondamentali come i fiumi e le coste.
5) Transizione verso l'economia circolare e la bioeconomia, volta a consentire il passaggio da un modello economico lineare a un modello circolare, ripensato in funzione di un modello di produzione additiva, in modo da permettere non solo il riciclo e il riuso dei materiali ma anche il disegno di prodotti durevoli, improntando così I consumi al risparmio di materia e prevenendo alla radice la produzione di rifiuti. Eliminare al contempo inefficienze e sprechi e promuovere una gestione circolare delle risorse naturali dei residui e degli scarti anche in ambito agricolo e più in generale dei settori della bioeconomia. Grazie al *Next Generation Europe* che intende attuare il *Green Deal* europeo, il cammino è già iniziato con le prime misure contenute nel Piano nazionale di ripresa e resilienza (PNRR).

Le decisioni rapide (e/ma ponderate) da adottare sono figlie anche della rapidità con la quale gli ecosistemi si deteriorano sotto la pressione dell'attività umana: "dovranno essere ideate e realizzate misure coordinate che richiedono grande sforzo di progettazione e di efficienza amministrativa. In parallelo dovranno mutare anche i modelli di comportamento e gli stili di vita dei cittadini.

Nel ribadire che la strada da percorrere sarà lunga e non priva di ostacoli, nel Piano si evidenzia la necessità di un "approccio attivo di consapevolezza": non si tratta, infatti, di mirare solamente a diffondere una consapevolezza di tipo 'passivo', ovvero di carattere prevalentemente informativo e/o educativo sui principali nodi dell'emergenza climatica e ambientale, ma di promuovere grazie alle evidenze scientifiche e ad un'attenta analisi di rischi e benefici una libera maturazione delle coscienze verso una cittadinanza più 'attiva', composta di scelte responsabili e consapevoli delle conseguenze ambientali delle azioni individuali e collettive, imprenditoriali e politiche.

Fondamentale sarà comprendere che in un sistema complesso come quello attuale, dove le azioni e le informazioni sono altamente interconnesse, influenzando globalmente e velocemente economia e comportamenti, non è possibile adottare un approccio settoriale e lineare alle diverse problematiche. Una soluzione ad un problema specifico potrebbe causarne un altro e la valutazione di impatto va sempre affrontata integralmente.

Non si può più pensare che esista un "esterno nello spazio o lontano nel tempo" cui non potersi interessare o non influire: ogni parte influisce e costituisce il tutto, attribuendo ruolo e responsabilità alle azioni a livello locale".

Il concetto di cultura ritorna più volte nel Piano, laddove - ad esempio - parlando di sostenibilità come motore del business per le PMI, il PTE ritiene che "possono altresì rendersi necessari strumenti ed incentivi che accompagnino le PMI e premino i comportamenti virtuosi per diffondere 'la cultura della sostenibilità' nelle aziende per far crescere responsabilità e qualità dei comportamenti delle persone".

Infine, il cerchio si chiude con il richiamo anche ad aspetti sociologici: "lo sforzo da compiere verso un futuro più sostenibile comporta rischi e opportunità, ma vuole essere giusto e all'insegna di un principio fondamentale: 'Nessuno deve essere lasciato indietro'".

Non solo: la transizione verso la neutralità climatica, la digitalizzazione e le nuove realtà demografiche, economiche e sociali che emergeranno intende essere un processo condiviso e sostenuto dai cittadini italiani ed europei con la loro partecipazione attiva. Se vuole aspirare al successo deve includere nel suo orizzonte dei target economico sociali ambiziosi e indicare la strada per raggiungerli: maggiore solidarietà tra generazioni; parità di genere; valorizzazione dei giovani; superamento dei divari territoriali; posti di lavoro e migliori condizioni di vita; educazione, formazione e innovazione di qualità; protezione sociale e sanitaria adeguata".

Responsabilità e chiarezza di intenti richiedono, a loro volta, attenzione a ogni minimo dettaglio: "l'esigenza di assicurare un processo di transizione ecologica veloce, oltre che equo e giusto, è strettamente connessa a quella di disporre di procedure amministrative trasparenti che permettano l'implementazione di piani e programmi da parte dei soggetti pubblici impermeabili a episodi di infiltrazione della criminalità". Occorrerà integrare nei progetti di sostenibilità la dimensione sociale, così come previsto dall'obiettivo 8 dell'Agenda 2030: "*Promuovere una crescita economica duratura, inclusiva e sostenibile, la piena occupazione e il lavoro dignitoso per tutti*".

Nondimeno, il Piano sottolinea la complessità del processo, definito un "cammino non lineare" che si pone come obiettivo il riequilibrio della relazione, oggi compromessa, tra lo sviluppo della società e l'ecosistema del pianeta, tra l'uomo e l'*oikos*, la "casa comune" cui fa riferimento l'etimologia del termine "ecologia". Rapidità e pazienza sembrano essere le parole chiave della filosofia alla base delle scelte pianificatorie del PTE: se l'impatto delle attività umane sul pianeta impone una transizione ecologica in tempi rapidi, infatti, la transizione stessa "implica l'avvio di mutamenti di lungo periodo, necessariamente correlati ad altri processi analoghi che riguardano più campi del rapporto tra società umane ed ecosistemi: la demografia; l'economia; l'agricoltura; l'industria e la produzione-distribuzione-consumo di beni e servizi; l'energia, ovvero le forme da cui si ricavano la forza motrice e il calore necessari alle attività industriali, alla mobilità e al benessere individuale e collettivo".

D'altra parte va sottolineato che le decisioni rapide (e/ma ponderate) per invertire la rotta e intraprendere quanto prima la trasformazione radicale degli assetti economici, industriali e sociali necessitano di consenso, di partecipazione e di un approccio non ideologico alle questioni aperte: «per conseguire gli obiettivi del piano sarà necessaria la volontà collettiva di collaborare al di là delle divergenze, che dovrà unirsi alla piena disponibilità a cambiare comportamenti e pratiche consolidate e ad operare concretamente attraverso l'impegno pubblico, dei singoli cittadini, delle imprese e del settore *noprofit*». Sicché la trasformazione radicale non potrà prescindere dalla centralità della ricerca scientifica nella produzione di innovazione (l'utilizzo delle tecnologie più efficaci e meno impattanti è un fattore fondamentale per tracciare la rotta della transizione) e dalla semplificazione delle regole che governano l'attuazione dei progetti, in modo da rendere possibile l'impegnativa opera di trasformazione nei tempi e nei modi previsti.

Le decisioni rapide (e/ma ponderate) da adottare sono figlie anche della rapidità con la quale gli ecosistemi si deteriorano sotto la pressione dell'attività umana: «dovranno essere ideate e

realizzate misure coordinate che richiedono grande sforzo di progettazione e di efficienza amministrativa. In parallelo dovranno mutare anche i modelli di comportamento e gli stili di vita dei cittadini, vale a dire una larga parte di quelle 'pratiche sociali' consolidate che contribuiscono a caratterizzare le relazioni di una società». Si tratta di scelte da fare e di nuovi comportamenti da adottare che influenzeranno in profondità lo sviluppo delle economie, ma il processo non sarà necessariamente gravoso se crescerà anche la capacità di sfruttare al meglio i vantaggi e i benefici che la transizione è in grado di offrire. Nel ribadire che la strada da percorrere sarà lunga e non priva di ostacoli, nel Piano si evidenzia l'importanza di un "approccio attivo di consapevolezza": non si tratta, infatti, di "mirare solamente a diffondere in tutti gli strati della società italiana una consapevolezza di tipo 'passivo', ovvero di carattere prevalentemente informativo e/o educativo sui principali nodi dell'emergenza climatica e ambientale, ma di promuovere grazie alle evidenze scientifiche e ad un'attenta analisi di rischi e benefici una libera maturazione delle coscienze verso una cittadinanza più 'attiva', composta di scelte responsabili e consapevoli delle conseguenze ambientali delle azioni individuali e collettive, imprenditoriali e politiche".

Invero, come è stato sottolineato dalla dottrina, «la crisi finanziaria, economica e sociale nonché le sfide legate alla globalizzazione economica, oltreché al cambiamento climatico, all'invecchiamento della popolazione e ai fenomeni migratori» possono essere affrontate anche partendo da nuovi modelli di valorizzazione della creatività ed innovazione nelle città, nel rispetto della sostenibilità, che in questa prospettiva paiono assumere la veste di «centri di innovazione produttiva e di innovazione sociale» .

A questo proposito, proprio per tentare di percorrere nuove vie, maggiormente in linea con le nuove sfide globali, si deve segnalare la tendenza a considerare nell'ambito del "nuovo" diritto urbanistico tra i criteri decisionali con sempre crescente *favor* l'introduzione dei canoni – cui viene data nuova luce e centralità - che possono riassumersi nella creatività, informalità e partecipazione.

Infine il modello della città sostenibile e creativa – non può sottacersi - sembra costituire una risposta assai in linea rispetto alle istanze e ai principi dettati dalla Convenzione di Faro[4], dove si afferma che il diritto al patrimonio culturale è inerente al diritto di partecipare alla vita culturale (art. 1) e chiunque, da solo o collettivamente, ha diritto a trarre beneficio dal patrimonio culturale e a contribuire al suo arricchimento (art. 4). La città creativa valorizza inoltre saperi e competenze, beni culturali materiali ma anche - e forse soprattutto – immateriali, e pertanto anche questa concezione ampia di patrimonio culturale sembra essere del tutto in linea con quella promossa dalla suddetta Convenzione.

Per altro verso, il modello di città creativa sembra corrispondere assai bene anche alle indicazioni relative al perseguimento degli obiettivi dello sviluppo sostenibile, così come formulati da ultimo nell'Agenda 2030, volta al perseguimento di uno sviluppo che possa essere inteso nell'accezione più ampia, inclusivo, equo, relativo al profilo economico e sociale, non più meramente ambientale, dei popoli e dei territori.

Segnatamente, in relazione ai profili concernenti la cultura, l'obiettivo di sviluppo sostenibile denominato SDG 11.4 promuove infatti la necessità che tutti salvaguardino, unitamente ad un ambiente salubre, anche il patrimonio culturale e naturale del mondo; in questa prospettiva sembra che - per raggiungere gli obiettivi di sviluppo sostenibile - la tutela e valorizzazione della cultura abbiano assunto da ultimo un ruolo determinante, al pari di altri settori come sanità, istruzione ed energia.

La Convenzione di Faro si pone come momento culminante di questo percorso volto a riformare il sistema culturale in senso sostenibile, contribuendo ad assegnare precipua rilevanza all'innovazione e alla partecipazione delle comunità patrimoniali ed, anzi, si può agevolmente osservare come il fine della conservazione e della gestione del *cultural heritage* possa venir

[4] Ratificata con legge 1° ottobre 2020, n. 133.

identificato nello sviluppo di una società umana maggiormente democratica, partecipata, pacifica e sostenibile[5] .

La nuova condizione di "espansione" delle prassi informali nella città e il progressivo ritrarsi del pubblico sembra ridisegnare una nuova *governance* dei sistemi urbani conseguente alla evidente crisi del modello classico di governo di questi sistemi ma anche indotta dalla massiccia risposta della cittadinanza, che sembra voglia finalmente riappropriarsi degli spazi e del ruolo centrale che le compete, "curando" in modo spontaneo ed in prima persona, ove possibile, i beni comuni che si riferiscono alla città. Sicché può ben dirsi che in tale contesto: «l'informalità (va) intesa come assenza di norme scritte, di ruoli gerarchici e, più in generale, di fluidità e plasticità delle regole (spesso non scritte) che animano le relazioni in questi luoghi»[6] .

Gia dagli anni '90, a partire dai principi sottesi nella legge 7 agosto 1990, n. 241, si è cominciato a preparare il terreno per lo sviluppo di un'amministrazione realmente condivisa; tuttavia, anche se si pone mente a numerosi principi costituzionali, ben precendenti rispetto alla modifica del 2001, si può notare la particolare concordanza dell'amministrazione condivisa con i valori espressi in Costituzione. In realtà essa si poteva desumere già «dal riconoscimento costituzionale della essenziale dimensione sociale della persona umana e dalla sua possibilità di realizzare, in quella dimensione, azioni positive e responsabili (sentenza n. 75 del 1992)».

In particolare, assumono un rilievo centrale in questa prospettiva i beni comuni, che potrebbero identificarsi in «tutte quelle entità…catalizzatrici – che possono suscitare nei cittadini attivi di cui all'art. 118, comma 4, Cost., l'autonoma iniziativa a prendersi cura di un interesse generale: vale a dire di un interesse che, non coincidendo del tutto con quello pubblico, con quello privato, con quello collettivo o con quello di una specifica categoria, risulti in concreto da un'alleanza di tutti i soggetti che possono essere di volta in volta coinvolti e si riconoscano nella volontà di realizzarlo effettivamente»[7].

Va inoltre rimarcato che la tutela dei beni comuni sembra avere grande impatto sulle politiche più intimamente riferibili al concetto di società, considerato che essa si intreccia con le politiche di inclusione sociale, con la rigenerazione urbana, con la valorizzazione delle periferie e più in generale con le politiche di welfare: la città delle differenze si basa in modo assai evidente sulla complessità sociale e contempla, ad esempio, iniziative per l'affidamento dei muri legali (a giovani esperti della *street art*).

Per tal via, in relazione agli spazi urbani, sembrano profilarsi diritti di cura, non di proprietà, ma un nuovo modo di essere cittadini[8], prefigurando quindi la possibile piena attuazione dell'articolo 118, ultimo comma, ricomprendendosi con il termine "cura" una vasta gamma di significati o implicazioni per il cittadino, non soltanto per i beni comuni, ma anche per le ricadute positive che l'azione del curare, - ossia il provvedere all'accudimento perlopiù volontario e frutto di una scelta consapevole - comporta sullo sviluppo della socialità degli individui, affinché l'operato di cittadini più consapevoli e attenti all'interesse generale conduca ad un maggior benessere psico-fisico e alla sconfitta della solitudine, oltre che ad una miglior fruibilità dei servizi e dell'offerta culturale nelle città.

I nuovi diritti di cura esercitabili dai cittadini - che in tal modo vengono da ultimo investiti di nuove responsabilità e vedono consolidarsi il proprio senso di appartenenza nei confronti

[5] Per tali considerazioni si v. il contributo di A. Simonati, *Il ruolo della cittadinanza nella valorizzazione dei beni culturali alla luce della Convenzione di Faro: niente di nuovo sotto il sole?,* in *Riv. giur. urb*., 2021, 248. Cfr. inoltre P. Carpentieri, *La Convenzione di Faro sul valore del* Cultural Heritage *per la società. Un esame giuridico*, in *Riv. giur. urb*., 2021, 274. Per un approccio più ampio al tema della valorizzazione dei beni culturali cfr. il contributo di A. Iacopino, *Modelli e strumenti per la valorizzazione dei beni culturali*, Napoli, 2017.

[6] Così A. Putini, *Beni comuni urbani*, Milano, 2019.

[7] Così F. Cortese, *Che cosa sono i beni comuni?,* in M. Bombardelli, a cura di, *Prendersi cura dei beni comuni per uscire dalla crisi. Nuove risorse e nuovi modelli di amministrazione*, Napoli, 2016, p. 37.

[8] Sull'argomento non può non citarsi la dottrina più autorevole che se ne è occupata sin dai primi anni '90: il riferimento è allo studio di F. Benvenuti, *Il nuovo cittadino*, Venezia, 1994.

della città – ha posto in evidenza altresì nuovi strumenti giuridici volti ad assicurare una amministrazione della città in condivisione o co-città: strumenti pattizi, da un lato (ad es. i patti di collaborazione per la gestione dei beni comuni, o i patti tra musei ed enti locali), la legislazione, dall'altro, come il codice degli appalti e ad es. la legge n. 2 del 2009, che sembra in linea con l'articolo 118, u. c. , laddove si prevede che cittadini organizzati possano formulare all'ente locale competente proposte operative per opere di interesse locale di pronta realizzazione, cosiddetti micro-progetti. Con tali proposte si prefigura un modello operativo utile ad avviare una rigenerazione civica degli spazi urbani, senza oneri per l'ente locale territoriale e con una consistente detrazione fiscale per i soggetti proponenti, tuttavia ciò che più rileva è attribuire la "difesa" della città e dei suoi spazi pubblici a coloro che più direttamente potranno beneficiarne. Segnatamente, i patti di collaborazione sembrano essere lo strumento che ha avuto maggior impatto nella costruzione e nello sviluppo – quasi inaspettato - della nuova concezione di amministrazione condivisa e partecipata. Essi appaiono come atti convenzionali, preceduti e autorizzati da un apposito regolamento, con i quali i cittadini e l'amministrazione comunale concordano -condividendo le responsabilità della cura e rigenerazione dei beni comuni urbani, al fine di migliorarne la fruizione collettiva, e fissando le obbligazioni reciproche-, la realizzazione di specifici interventi di gestione, tra i quali risultano preponderanti le attività di gestione e manutenzione del verde urbano.

In altre parole, sembra che i nuovi strumenti pattizi soddisfino una duplice finalità, posto che l'interesse generale che essi sottendono coincide "tanto con l'esigenza dei cittadini, abilitati con questa particolare tipologia di strumenti ad operare anche in forma individuale,…di esprimere la propria propensione alla partecipazione ad attività relative alla comunità di riferimento, quanto con quella delle amministrazioni locali di individuare forme innovative di gestione dei beni pubblici" [9].

Bibliografia

Accettura B. (2020). *Periferie e coesione sociale: politiche abitative e diritto "alla città"*, in *Periferie e diritti fondamentali*, M. Immordino, G. De Giorgi Cezzi, N. Gullo, M. Brocca, a cura di, Napoli, p. 19.

Benvenuti F. (1994). *Il nuovo cittadino*, Venezia.

Carpentieri P. (2021). *La Convenzione di Faro sul valore del* Cultural Heritage *per la società. Un esame giuridico*, in *Riv. giur. urb*., p. 274.

Cortese F. (2016). *Che cosa sono i beni comuni?*, in M. Bombardelli, a cura di, *Prendersi cura dei beni comuni per uscire dalla crisi. Nuove risorse e nuovi modelli di amministrazione*, Napoli, p. 37.

De Leonardis F. (2021). *La transizione ecologica come modello di sviluppo di sistema: spunti sul ruolo delle amministrazioni*, in *Dir. amm*., p. 779.

Iacopino A. (2017). *Modelli e strumenti per la valorizzazione dei beni culturali*, Napoli.

Moliterni A. (2021). *Il Ministero della transizione ecologica: una proiezione organizzativa del principio di integrazione?*, in *Giornale di dir. amm*., p. 439.

Putini A. (2019). *Beni comuni urbani*, Milano.

Simonati A. (2021). *Il ruolo della cittadinanza nella valorizzazione dei beni culturali alla luce della Convenzione di Faro: niente di nuovo sotto il sole?*, in *Riv. giur. urb*., p. 248.

[9] Così B. Accettura, *Periferie e coesione sociale: politiche abitative e diritto "alla città"*, in *Periferie e diritti fondamentali*, M. Immordino, G. De Giorgi Cezzi, N. Gullo, M. Brocca, A cura di, Napoli, 2020, p. 19.

ISBN: 978-2-931089-30-9

PNRR and Sustainability: the Environmental and Energy Transition

Giovanna CROCCO*
PhD Candidate - Italia

Abstract: Climate change is a great threat to mankind because, as a result of human activity, processes have been triggered that risk being irreversible. The increase in CO2 emissions, which began with the industrial revolution of the late nineteenth century, has altered the concentration of greenhouse gases, with the result of a global temperature increase of about 1 ºC since the beginning of the last century but with a strong acceleration in recent years. If the current trend continues as it has in the past, the average temperature will increase by 4-5 ºC, with catastrophic effects for the entire planet such as the disappearance of glaciers, sea rise and a significant increase in extreme weather phenomena. These effects, which are already serious in themselves, also have strong impacts on the real economy, affecting the productivity of agriculture and fisheries and altering energy demand and production. The Green Deal, in particular, represents one of the most ambitious growth programmes of European origin, aimed at making Europe not only the first climate neutral continent by 2050, but also the world leader in the fight against climate change, a resource-efficient, market-competitive, inclusive and socially equitable community. The underlying strategy consists of a series of regulatory provisions and investments aimed at ensuring greater sustainability and less harm to the environment. Although the programme is fully supported by the European Investment Bank, the raising of additional capital on the market through the involvement of private investors is a key step. The Covid-19 pandemic has, paradoxically, been an element of further stimulation and union of the European community, accelerating a series of long-term choices aimed at restarting the economy and concretized in the Next Generation EU program that, for the climate, He's completely integrated the Green Deal. The Next Generation EU programme is not limited to buffering the damage caused by the pandemic, but has a long-term perspective for future generations, which should fully benefit from it; The value of the program is 750 billion and 90% is represented by the Recovery and Resilience Framework (Device for Recovery and Resilience), consisting in part of non-repayable funding partially subsidized. In order to access these funds, each nation must submit its own plan (National Recovery and Resilience Plan) with defined time and objectives. Italy is one of the biggest beneficiaries of the funds and this is a unique opportunity to reform and refound our country. The main objective of this research work is to analyse the critical issues and new opportunities for the economic and financial system in the broad field of sustainable development through the introduction of the PNRR.

Keywords: Sustainability, Environmental,Energy Transition

Introduction

Climate change is defined as "any change in climate directly or indirectly attributed to human activity, which alters the composition of the world's atmosphere and adds to the natural variability of the climate observed in comparable periods of time". Human activities are the main

* Corresponding Author: croccogiovanna92@libero.it

cause of climate change, as they intensify a natural phenomenon - the greenhouse effect - that guarantees the maintenance of adequate heat of the Earth's surface. Man, therefore, is both the author and victim of climate change. When solar radiation reaches the Earth's surface, some of it is retained and re-emitted in the form of infrared rays, heat energy. The energy is irradiated on the earth by means of greenhouse gases (i.e. carbon dioxide, methane, nitrous oxide, ozone and chlorofluorocarbons naturally present in the atmosphere) that allow the maintenance of the average surface temperature around 15 ºC; The processes of industrialization, which began with the Second Industrial Revolution in the nineteenth century, have led to a dramatic increase in their concentration in the atmosphere. The main consequences of this rise in temperature can be summarized as follows:

1) melting of glaciers and rising sea levels;
2) significant increase in extreme weather phenomena;
3) loss of biodiversity.

The aim of this paper is to describe the economic aspects of these changes, both at the social and individual levels.

The economic effects

Climate change directly impacts the real economy not only because of the damage caused but also because it disrupts the value chain of economic activities and partly transfers losses to other operators (think, for example, of the impact on the balance sheet of insurance or banks in the case of assets secured by credit claims). There are numerous studies that seek to quantify the economic impacts of climate change; particularly interesting within the EU Science Hub, the "Project of Economic impacts of climate change in Sectors of the EU based on bottom-up Analysis ("PESETA IV") whose aim is precisely to understand the effects of climate change on Europe in various sectors and how these effects can be avoided by mitigation and adaptation policies.

The analysis hypothesizes 3 temperature rise scenarios (No Action + 3 C, Climate Mitigation +2 C, Climate Mitigation +1.5) and estimates the economic impact on 11 areas (mortality from heat and heat waves, storms, water resources, drought, flooding of rivers, rising seas, forest fires, loss of habitats, forests and ecosystems, agriculture, energy supply). With a further step, the study also assesses the impacts on humans and the relative economic loss that together constitute the "welfare losses"; in this case the model takes into account only 5 of the 11 initial areas namely agriculture, energy supply, sea rise, flooding of rivers, drought. The results of the study are summarised below.

The loss of well-being per year varies a lot a) depending on the climatic scenario analyzed (temperature +1 somebody C, +2 person C, +3 person C) and b) if mortality is included or not; in the scenario "a" we are faced with a loss respectively of 6 or 18 or 54 billion per year, in scenario "b" the figures become 42, 83 or 175 billion per year The above data are average values but if you analyze by geographical area you can see a worsening gradient that goes from north to south; in other words, the countries of the Mediterranean are much more exposed than those of northern Europe. The last point is that the data do not relate to all areas but only to part of them. The following conclusions can be drawn from this:

a) the magnitude of the welfare losses in the southern regions of Europe is several times that of the north,
b) the progression of damage is not linear and climate mitigation makes the difference,
c) considering the bias of the data being excluded from the simulation some areas the situation could be worse than the previous one. (https://ec.europa.eu/jrc/en/peseta)

The financial effects

Financial risks that can be grouped into Credit risks, Market risks, Operational risks, Other risks. (Consob Books of Sustainable Finance, June 2021, p. 55.) Credit risk: the credit risk is the one exposed to anyone who grants a loan and is the possibility that the debtor is not able to repay all or part of the credit; This in practice means that financial intermediaries are inherently exposed to this risk. This risk would also be exposed to funding for companies active in polluting or extractive sectors that would become more expensive; this would reduce profits and increase the risk of not being able to repay debt for these companies, It should be borne in mind that governments are also affected by the situation; the loss of production implies a reduction in revenue from taxes, thus generating an increase in demand, which means higher borrowing costs, In theory, they could lead to an increase in credit risk for so-called sovereign exposures Market Risk: Market risk is that resulting from the uncertainty of investment and securities revenues as a result of changed market conditions. Banks usually manage risks based on historical values and projections/scenarios.
The difficulty in this case is twofold because:

a) historical series are of relatively little value because the situation is constantly changing and events and their consequences are often worse than what has happened in the past, if not completely unexpected;
b) the improvement of scientific knowledge and the continuous updating that follows often leads to the realization that the situation is worse than initially assumed and, in the case of market risk, priced.

As a result, the uncertainty of timing, location and modalities of the effects of climate change and associated weather events can make markets less stable and lead to unexpected price movements. Finally, operational risk is classically related to the risk of losses resulting from failures or inadequacy of internal processes, human resources, technological systems or external events. In order to limit this risk to the climate change-related part only and, with reference to the previous point, to the part of the internal processes about the estimates, We will focus on technological systems and extreme events that in this case are closely related. In particular, the IT sector plays a crucial role in the current economy and it often happens that some services of this nature are located abroad, in emerging countries, due to lower costs, which may not be equipped for climatic emergencies because they channel available resources to profitable activities. In this sense, a flood in a region of India that puts out of use a center can become a big problem for the possible Italian company that has entrusted to this center a certain type of service, stressing once again that problems and solutions must be global. Other financial risks that complement the framework described so far are the Liquidity risk, that is the risk that the bank will not be able to meet its payment commitments due to excessive liquidity requests from customers p.e. damaged by a flood; the legal liability risk, that is, the risk of being involved in a legal dispute on environmental issues and the reputational risk, that is the risk that the counterparties of the institution and/or investors associate the institution with adverse environmental effects. ("Central Banks, Climate Risks and Sustainable Finance", in Economics and Finance Issues, March 2021, Bank of Italy, p. 29)

The PNRR and the perspective of the Green Economy in the Italian context

The pandemic of Covid-19 has affected the entire planet, spreading with an unexpected virulence and speed and hitting hard all the world economies; in this case, however, "the world economy" It is not a distant and abstract concept that has manifested itself in the London or New York Stock Exchanges but has been concretized in the daily life of families. Europe's

response to a crisis of this magnitude is the preparation of a series of coordinated initiatives in a maxi-programme worth 750 billion euros, with the precise objective of relaunching the European economy overwhelmed by the pandemic. The Recovery Fund, renamed Next Generation EU35 ("NGEU"), consists of a temporary tool for recovery, which will help repair the immediate economic and social damage caused by the coronavirus pandemic and is aimed, In essence, the creation of a Europe post Covid-19 more green, digital, resilient. The Fund in question is linked to the budget for 2021-2027 of the European Union, which is worth a total of 1,800 billion of which 750 of NGEU plus another 1,000 on budget and the placement on the markets of issued securities will allow member states to finance the recovery of European economies. In particular, more than 50% of the amount is intended to support modernisation through:

i) research and innovation;
ii) fair climate and digital transitions through the Fair Transition Fund and the Digital Europe programme;
iii) preparation; recovery and resilience, through the recovery and resilience mechanism, and a new health programme, EU4Health;
iv) the modernisation of traditional policies, such as cohesion policy and the common agricultural policy, to maximise their contribution to the Union's priorities;
v) the fight against climate change, to which 37 % of European funds will be reserved, the highest percentage ever for the EU budget;
vi) the protection of biodiversity, as well as gender equality.

Specifically, within the National Recovery and Resilience Plan (PNRR) must be indicated the impact of investments and reforms on the reduction of greenhouse gases, on the share of energy from renewable sources and the integration of the energy system. The remaining 10% of the total amount of NGEU is given by 6 initiatives the largest of which is the REACT-EU worth 47.5 billion to be spent in 2021-2022 and intended to buffer emergencies Paradoxically, the pandemic has helped to accelerate some processes by acting as a catalyst for a common European policy, a hoped, greater cohesion among EU members, an acceleration on climate issues; On this last point, the Green Deal has been substantially integrated within NGEU choosing therefore not to postpone any of its climate and environmental objectives but rather using it as leverage. The intent is to promote the relaunch of the economy not only more attentive to the aspects of short-term profit but also to those of inclusiveness, ecology, digitization without neglecting competitiveness, all based on six missions:

- ecological transition;
- digital transformation;
- sustainable development;
- social and territorial cohesion;
- health and economic, institutional and social resilience;
- policies for the new generations.

The PNRR and the 6 missions The National Recovery and Resilience Plan (PNRR) represents a unique and historic opportunity, which provides an unprecedented amount of economic resources and, as such, must be managed effectively and efficiently. Above all it is an unrepeatable opportunity to refound Italy with an integrated and forward-looking approach that, fundamentally, has been lacking in recent decades characterized by a "visual" navigation aimed at the search for consensus and, most of the time, to immediate electoral needs only. The PNRR, as indicated in its premises, "is part of a broader and more ambitious strategy for the modernization of the country" for the achievement of which Italy "must combine imagination, design ability and concreteness to deliver to future generations a more modern country, within a stronger and more united Europe". The PNRR of Italy was presented on 30 April 2021 and is worth 235.1 billion Euro, from RRF for 191.5, from REACT-EU for 13.0 and from complementary fund for 30,6; the latter was established by the Government with Law 101/2021 and is

an integral part of the PNRR of which it shares "common implementation tools and a unitary monitoring system through the Regis information system provided by the 2021 budget law" as indicated in the PNRR itself. The disbursement of funds by the European institutions will take place every 6 months following the assessment of the achievement of the objectives. The PNRR, Italy was presented on 30 April 2021 and is worth 235.1 billion Euros, from RRF for 191.5, from REACT-EU for 13.0 and from Supplementary Fund for 30.6; the latter was established by the Government with Law 101/2021 and is an integral part of the PNRR of which it shares "common implementation tools and a unitary monitoring system through the Regis information system provided for by the 2021 budget law" as indicated in the PNRR itself. The disbursement of funds by the European institutions will take place every 6 months following the assessment of the achievement of the objectives.

The PNRR is developed on the basis of three strategic axes, shared at European level that identify themselves in:

i) digitization and innovation,
ii) ecological transition, and
iii) social inclusion.

These Guidelines have a transversal impact on the entire NRPV, ensuring a distribution of assets that sees the Mezzogiorno and the ecological transition absorb much of the resources, without neglecting the digital transition Finally, due to the relative scarcity of traditional resources and the abundance of some renewable resources, it is the country that can benefit most from this ecological transition. Mission 2 "Green Revolution and Ecological Transition" has the highest budget of the PNRR of about 59.47 billion euros and provides for the following general objectives:

i) make the Italian system sustainable in the long term by ensuring its competitiveness
ii) make Italy resilient to the inevitable climate change by strengthening the infrastructure and the ability to predict natural phenomena and their impacts
iii) develop a international system industrial and technological leadership in the main areas of ecological transition
iv) ensure an inclusive and fair transition; maximising employment levels and helping to reduce the gap between regions
v) raising awareness and promoting culture of environmental and sustainability challenges and problems.

Composed of four components, Mission 2 is divided as follows:

- Component 1: Sustainable agriculture and circular economy;
- Component 2: Energy transition and sustainable mobility;
- Component 3: Energy efficiency and redevelopment of buildings;
- Section 4: Land protection and water resources.

Component 1 aims to "pursue a double path towards full environmental sustainability". The first path refers to the improvement of the management not only of the waste but also of the circular economy, strengthening the infrastructures for the collection that, for Italy, involves the Recovery of a significant gap compared to the rest of the Eur"Central Banks, Climate Risks and Sustainable Finance", in Economic and Financial Issues, March 2021, Bank of Italy, p. 29opa. the PNRR is articulated in six Missions, all in line with the six pillars of the NGEU, and sixteen Members. of the ports of southern Italy.

For the purposes of this report, Mission 2 is of particular importance, so a brief analysis is given below. The ecological transition to "complete climate neutrality and sustainable environmental development to mitigate threats to natural and human systems" is an increasingly urgent need (PNRR, p. 116). This is because climate change inevitably requires action by the international community to mitigate its consequences and prevent deterioration on a scale. Without "a substantial abatement of climate-altering emissions, global warming will reach and exceed 3-4

ºC by the end of the century, causing irreversible and catastrophic changes in our ecosystem and significant socio-economic impacts" In the light of these elements, the ecological transition represents a unique opportunity for Italy, which must necessarily be undertaken in the light of its hydrogeological and geographical characteristics. Italy, in the first place, is characterized by a natural ecosystem, agriculture and biodiversity unique in the world; in the second place it is, because of its characteristic geographical configuration, among the countries most exposed to climate risks.

This, according to the NRPV programme, would be possible through the modernization and development of new waste treatment plants and, above all, by bridging the gap between the regions of Northern Italy and those of CentralSouth and implementing highly innovative projects for strategic supply chains such as waste from electrical and electronic equipment, paper and cardboard industry, textile, mechanical and chemical recycling of plastics. The second path refers to the development of an agricultural/ food chain as smart and sustainable as possible that takes up the mission of reducing the environmental impact in one of the typical Italian excellence.

With reference, however, to Component 2 in order to achieve the goal of decarbonisation of all sectors have been provided for measures to increase and strengthen the networks, for "to accommodate and synchronise new decentralised renewable and flexible resources and to decarbonise end-uses in all other sectors, with a particular focus on more sustainable mobility and decarbonisation of certain industrial segments, including initiating the adoption of hydrogen-based solutions.

The main objective of Component 3 is to strengthen energy efficiency levels. This objective would be pursued by increasing the level of efficiency of buildings 4.

Finally, it is necessary to point out Component 4 that, on the basis of the premises laid down by the previous components, puts in place actions to strengthen the resilience of our country. In particular, Component 4 aims at:

i) making Italy more resilient to climate change;
ii) protecting nature and biodiversity;
iii) ensuring the safety and efficiency of the water system.

Although Component 3 plays an extremely important role, Components 1, 2 and 4 can be considered of considerable interest for our country and opportunities to be taken for Italian specificity. In particular, with reference to Component 1, "Italy is characterized by a heritage of biodiversity among the most significant in Europe"46 and, even more interesting, is the high rate of endemism; This last aspect means that there are species that grow only in Italy and that therefore it is a great responsibility to protect them. This circumstance could be limited to an "ethical" responsibility about their protection if it were not that in some cases it is a species or commercial interest since they are part of the food chain that is notoriously an economic resource for our country or contribute to the "panorama" of equal economic value for tourism. (PNRR, p. 116.)

Small and medium enterprises and the Italian context

SMEs in the non-financial sectors play an essential role in the national entrepreneurial fabric; although the pandemic has had a significant impact on the Italian socio-economic fabric, affecting all companies across the board, Italian SMEs with a high growth potential have shown a strong propensity to resilience during this period; in this regard, a Banca d' Italia survey found that of the 2,800 potential SMEs eligible for listing, 75-80% overcame the Covid-19 crisis. The data reflects and introduces the argument of the alternative capital market generally known as AIM (Alternative Investment Market) to which the above data refer. AIM is managed by Borsa

Italiana and is composed of medium and small Italian companies; according to an analysis of the observatory AIM59, AIM Italia has generated positive impacts on the national economy in terms of employment.

The sectors that occupy, on average, the greatest number of resources are Industry (28%), Technology (22%), Services (14%), Fashion and Luxury (8%). From the date of IPO, on average, the companies mark a positive change in the number of employees, equal to +62%. The first 5 sectors with the highest increase from IPO are Media (+121%), Renewable Energy (+104%), Technology (+63%), Healthcare (+53%) and Fashion and Luxury (+52%). Always in reference to the analysis of the observatory AIM "the long-term prospects could improve thanks to the allocation of European funds Next Generation EU and the Recovery Fund, with positive effects on the real economy that could be reflected on the creation of value of companies also in terms of remuneration" (European Commission, SBA Fact Sheet Italy, 2019).

The PNRR, therefore, is a useful tool through which our country has the concrete possibility of becoming a leading country in the circular economy, also through the construction of a positive ecosystem and such as to restart the economy by adopting a new vision However, despite the extremely significant economic effort in the capital injection guaranteed by the PNRR, As already mentioned, the latter alone does not appear to be sufficient for a real recovery of the Italian economic fabric and it is necessary to direct private financial flows into the relevant economic activities. In this context, the framework of sustainable finance and the union of capital markets are mutually reinforcing, creating more opportunities for businesses and investors; capital markets, which are well integrated and efficient, should also act as catalysts for the effective mobilisation and allocation of capital towards sustainable investment. This said to the SMEs that want to quote themselves in order to grow ulteriorly remain two options; the first consists of issuing minibonds, also of limited size, which require a path of maturation and knowledge of the mechanisms related to listing, the second, is represented by the listing on the stock exchange and, in particular, in the AIM segment.

The element of mandatory transparency necessarily leads to a sharp reduction in information asymmetries, as well as greater discipline on the part of administrators; In addition, the increased visibility gained through listing guarantees a wider range of possibilities for other companies in terms of their commitment to M&A activities (Bank of Italy, Nota_Covid_PM_quotabili_12_gennaio_2021) In the light of the above, it is possible to say that a larger number of listed SMEs could contribute - in a decisive way - to the increase in the total capitalisation of the Italian market and, consequently, to reduce the existing gap with other European economies; and in general, international. Between the main motivations that restrain the access to the stock market from the enterprises there are, beyond the relative reduced average dimension, factors of type "cultural", legacies above all to the fear of loss of the control of the company (usually of family matrix) and the lack of financial education in our country; to this is added an even more important motivation that is represented by the costs of various kinds that accompany The price, resulting from heavy regulation.

With regard to this last consideration, a series of measures have been introduced to try to overcome this type of obstacle, including:

a) the legislation on Aid for economic growth (ACE), which reduced the tax disadvantage of venture capital over debt,
b) L. 116/2014, aimed at ensuring that non-listed companies issue multiple-vote shares and retain them even if they are subsequently quoted, and
c) the 50 per cent tax credit on costs incurred for IPO as of 2018.

For the purpose of this report, it is necessary to highlight that the market in question is characterised by a particularly flexible regulatory structure, tailored to the characteristics of PMI64. The total value of IPO capital raising on the AIM is estimated at EUR 3,9 billion; in addition to the above, it should be noted that the increase in liquidity over the years, was helped not only

by the growth of the market but also by the introduction - in 2017 - of the Individual Savings Plans (PIR), which identify themselves in forms of investment (tax-encouraged) able to convey private savings to SMEs (art. 1 of the d.l. n 201/2011 and from the D.M. of 3 August 2017).

The possible role of SPACs in sustainable development

The Special Purpose Acquisition Companies ("SPAC") identify themselves in a particular type of listed investment vehicle constituted in the form of a company: in particular, the SPAC is a "company with only cash", raising on the capital market with the aim of carrying out one or, where appropriate, more investment/integration operations in target companies, within a predetermined period, generally between 18 and 24 months. The SPAC consists of a group of promoters whose main task is: a) to define the investment strategy and b) to provide the necessary capital to cover the costs arising from the listing and operational management

Conclusion

The ongoing climate change is the greatest challenge of the century for mankind; the scientific data collected so far confirm the responsibility of man for the increase in temperature and the scenarios that are expected, in the absence or even late response to the problem, are potentially disastrous. The effects of these changes, together with those resulting from poor land management, are evident and under the eyes of all as increasingly important as the consequences of a socio-economic damage resulting from the intensification of extreme acute or chronic phenomena that are in addition to the costs themselves, reduces the overall ability to produce income that affects the stability of the financial system.

The results of studies conducted by central banks and supervisors to contribute "to the analysis and management of climate and environmental risks in the financial sector and mobilize financial flows to support the transition to a sustainable economy" show confirmation and difficulty. The first confirmation is that the two drivers of climate risk are physical risk and transition risk; the second is related to the traditional risk categories of the Basel framework which, although they need some adjustment, have proven their worth in addressing climate risks. and environmental in the financial sector and mobilise financial flows to support the transition to a sustainable economy" show confirmation and difficulties. The first confirmation is that the two drivers of climate risk are physical risk and transition risk; the second is related to the traditional risk categories of the Basel framework which, although they need some adjustment, have proven their worth in addressing climate risks.

The difficulties that emerge from the analysis can be traced back to

a) the uncertainty and the speed at which changes are taking place as there is no precedent to refer to,
b) the non-linearity of climate change itself and its consequences amplifying uncertainty,
c) the difficulty of translating it into predictive models for calculating the exposure value.

One consideration about the latter point is that the estimates that can be made are probably undersized; it is not possible to quote all the effects on elements that have no market value and in some cases estimates are only possible ex post, It is still difficult to understand how mitigation policies are transmitted to the real economy and the financial system because of the insufficient availability of data and a common language to interpret them. The growing awareness of the problem of climate change has fostered international debate and stimulated forms of collaboration to find solutions and orient economic development in a more sustainable way. It

goes in this direction the Green Deal that has been fully included in the NGEU program born, the latter, to respond to the emergency Covid but designed for the Europe of the future.

With the recent adoption the first delegated acts of the Taxonomy on Climate Change have defined and made operational the criteria that, on a scientific basis and common to the whole of Europe, allow to certify whether a project or an activity is sustainable; this is essential in order to channel the necessary capital flows additional to those, albeit substantial, deployed by the EU. The PNRR is an extraordinary opportunity to accelerate the ecological transition and recover many gaps (digital, infrastructural, legislative, gender and basic skills) that Italy suffers from and that have proved critical in the past.

The ambition is, through an intense decarbonisation and a rethinking of the development model, to modernize the country to make it a more sustainable system in the long term; the process will affect all sectors of the economy and society, from households to businesses, public administration, physical and intangible infrastructure aiming at full environmental sustainability. In this the PNRR, through the decisive contribution of the Financial Intermediaries, will be able to carry out the double function of catalyst before and after fly for the Italian economy. The uniqueness of the Italian heritage will require specific interventions to preserve its ecosystem, biodiversity and the territory that is among the most exposed, especially the southern regions, to climate risks. At the same time, it will be a great opportunity to take advantage of the adoption of innovative solutions in the management of natural resources, water in the first place, control of the territory and in the fields of agriculture and circular economy, areas in which Italy already has leadership. All these opportunities could be seized by SMEs, which are the subject of particular attention of EU projects, in Italy even more than in other countries are a primary hook of the economy.

SMEs can be the protagonists of this Green Revolution and Ecological Transition but to grow they need to be supported in terms of

1) approaching the issues of sustainable development,
2) overcoming managerial deficiencies, and
3) capitalization.

For the first point, Financial Intermediaries are particularly important for the advisory role they will have to play towards SMEs; They will need to make them understand that failure to adopt sustainable behaviour exposes them to credit rationing risks (or higher loan costs) and the loss of opportunities to benefit from EU advisory services and fundingDigital technologies in general will also play a significant role because, through ad hoc applications, platforms made available, information distributed and accessible independently at all times, will contribute to improving the quality and comparability of information by reducing costs and facilitating access to markets; together with the introduction of innovative services and the Internet of activities will change approach and operation of the economic system-financial.

The Italian stock market today has roughly the same number of listed companies as 25 years ago, 80% of the capitalization is represented by 40 companies, the number of IPOs is modest and investors specializing in low-cap securities are few; these elements introduce the other two aspects mentioned above relating to managerial deficiencies and the low capitalisation of SMEs. In this context, SPAC is considered a "product" on the border between the capital market and private equity: in fact, while assuming from its inception the characteristic of an open company, whose shares are traded on a market, has some of the typical characteristics of the "contract" between manager and investor of a fund. The instrument, even if complex, would be able to organize the incentives towards the three stakeholders (i.e. pure investors, promoters, especially if they come from the industrial management and the partners of the target company) efficiently. In addition, the complexity of this instrument is precisely graded by the variables relating to the economic interest of each actor, in order to facilitate the mediation implied in each agreement. In a context like the Italian one rich in niche excellences in which the need for

 ISBN: 978-2-931089-30-9

SMEs to access new economic resources is accompanied by the renewed need for sustainable economic projects Within the framework of the Green Revolution and Ecological Transition, SPACs could bring their, albeit partial, contribution.

ISBN: 978-2-931089-30-9

La sostenibilità della produzione della fibra di ginestra

Antonella REITANO*
University of Calabria - Italy

Pietro SQUILLA
Managing Director at "Ferro Duo Italia s.r.l." - Swiss

Marco FAZIO
University of Calabria, Dante Alighieri University - Italy

Abstract: 60 years ago, in the Calabrian towns and villages, the production of broom (Spartium junceum) yarn was practiced. Broom is a spontaneous plant, very widespread in Calabria. In September, with the arrival of the rain, necessary for the production cycle, it was common to see, at the door of the house, peasant women engaged in the various stages
and helped by relatives and friends.
This research aims to analyze the sustainability of the recovery of the aforementioned processing, not only from a purely economic point of view, but from a perspective of tourism development and promotion of the territory.

Keywords: Broom yarn, sustainability, fashion, textile

1. Introduzione

Nel meridione d'Italia, fino agli anni '60 del secolo scorso, le contadine producevano la fibra di ginestra, per poi tesserla e produrre biancheria per la casa e coperte.
Il processo di produzione, lungo, laborioso e faticoso è stato dismesso, negli anni '60 del secolo scorso, a seguito della diffusione di tessuti acrilici e al miglioramento delle condizioni economiche che hanno permesso alle contadine calabresi di affrancarsi dai lavori più pesanti. Lo sviluppo economico e il conseguente consumismo hanno generato un forte degrado ambientale che richiede necessariamente e improrogabilmente una rivisitazione degli stili di vita, dei valori, dei consumi. In quest'ottica, si analizza la sostenibilità della produzione di fibra di ginestra e soprattutto la misura in cui le nuove generazioni ne farebbero uso.

2. I processi evolutivi della moda

La moda è un "Fenomeno sociale che consiste nell'affermarsi, in un determinato momento storico e in una data area geografica e culturale, di modelli estetici e comportamentali (nel gusto, nello stile, nelle forme espressive), e nel loro diffondersi via via che a essi si conformano gruppi più o meno vasti, per i quali tali modelli costituiscono, al tempo stesso elementi di coesione interna e di riconoscibilità rispetto ad altri gruppi (Istituto dell'Enciclopedia italiana Treccani, 1989, pag. 264).

* Corresponding Author: A.Reitano@unical.it

L'abbigliamento di una popolazione, dunque, è correlato alle sue vicende storiche politiche ed economiche ed evidenzia rilevanti cambiamenti, in concomitanza di accadimenti di particolare importanza. In periodi di guerra o di recessione economica, ad esempio, gli abiti sono più semplici e rigorosi. Ben diversi e ricchi di decori ispirati ai fiori e alla natura, sono stati gli abiti della Belle Époque, ossia l'epoca "della serenità, della beatitudine, della quiete, della sicurezza … e che continuava le tradizioni brillanti, sbalorditive, egoiste, saltellanti, frivole, fastose del Secondo Impero." (AA.VV., 1966, pag. 15)

Molti cambiamenti che si sono verificati, soprattutto nell'abbigliamento femminile, sono stati generati anche da motivazioni a carattere ideologico (i movimenti emancipazionisti delle donne) e igienico-sanitari (come l'abbandono del busto, stretto e insalubre). In quest'ottica, molto devono le donne a Coco Chanel, che creò il tailleur, affinché affrontassero il mondo del lavoro, con un abito adeguato al "costume" degli uomini. Ella pensò molto alla comodità per le donne quando creò le scarpe con la zeppa, dopo essersi bruciata i piedi, sulla sabbia di Venezia e la borsa a tracolla, affinché potessero muoversi più agilmente, con le mani libere. Ha persino dato il nome a un particolare tipo di calzature, aperte dietro e con tacco basso "modello chanel".

Prima di Coco, Jeanne Paquin, nel 1892, a Parigi, in Rue de la Paix, n 5, diede vita al primo negozio di haute couture (Consiglio, 1966, 384). È la prima donna che può fregiarsi del titolo di stilista: nella Francia della Belle Époque i sarti, da semplici artigiani divennero arbitri del gusto. Nel 1906, Henry Gervex dipinse "Cinq heures chez Paquin", ossia un salone riccamente adornato, in cui si danno appuntamento le signore per ammirare le ultime creazioni. Il quadro sottolinea il ruolo sociale e ludico del commercio, dell'intrattenimento, oggi sottovalutato, a causa dello sviluppo degli acquisti digitali. Quest'ultimi, peraltro, sono forti causa di inquinamento ambientale: ogni pacco (anche se contiene prodotti di pochi grammi), comporta lo spreco di notevoli quantità di materiali vari per imballaggio e di carburante. Le conseguenze sull'ambiente sono disastrose.

L'abbigliamento è stato per secoli, indicatore dell'appartenenza a un certo ceto sociale e professionale (ad esempio divise militari, o sanitarie, o ecclesiastiche). A tal proposito, è doveroso ricordare che la Rivoluzione francese ebbe effetti non solo in Francia, bensì in tutt'Europa: le cronache dell'800 testimoniano infatti come durante il secolo fosse sempre più difficile riconoscere nell'abbigliamento della popolazione quelle diversità che permettevano di distinguere un ricco da un cittadino o da un artigiano. Seppure la moda possa sembrare intrisa di frivolezza e superficialità, in realtà porta con sé lo spirito del tempo in cui nasce e si sviluppa: allora rifletteva il bisogno di uguaglianza che l'estenuante malcontento sociale aveva portato alla presa della Bastiglia.

Cambiamenti importanti si ebbero anche a seguito della Rivoluzione Industriale, per quanto riguarda la produzione di tessuti, con l'impiego di nuove e più performanti macchine e che dunque riducevano drasticamente tempi e costi di produzione. Importante conseguenza di ciò è stata la creazione e la diffusione del prêt à porter.

Nel processo evolutivo della moda, negli anni più recenti, la tutela dell'ambiente ha assunto un ruolo sempre più rilevante. Conclusasi l'incosciente opulenza degli anni '80, improntata all'ostentazione del lusso e dei suoi simboli (in primis le pellicce), il crescente rispetto per gli animali e per l'ambiente ha mutato i comportamenti di acquisto e di consumo. Fortunatamente, le pellicce sono prodotte e vendute in misura sempre decrescente e diverse aziende si impegnano a fabbricare prodotti che siano rispettosi dell'ambiente: è il caso dell'azienda "Cangiari" (in italiano, cambiare) che oltre ad altre attività negli ambiti del turismo responsabile, dell'agricoltura biologica, dello sviluppo locale, dei servizi sociali e sanitari, persegue l'interesse generale della comunità e l'integrazione sociale e professionale di persone svantaggiate (https://cangiari.it).

Il rispetto dell'ambiente appare dunque improcrastinabile, unitamente al desiderio di uno stile di vita sano. La natura e i suoi frutti hanno un ruolo fondamentale.

3. La produzione della ginestra

Nel succitato scenario economico-sociale, il recupero di lavorazioni antiche e artigianali, quali la lavorazione della fibra di ginestra, assume un ruolo importante. Tale pianta selvatica, detta anche odorosa o di Spagna (latino scientifico *Spartium junceum*) è molto comune nell'area mediterranea (Katović D., Katović A, Krnčević M., 2011; D'Orazio, Martuscelli, Orsello, Riva, Scala, Taglialatela, 2000) e più segnatamente nella Locride: un grande ginestreto era la collina Varraro, molto sfruttata dagli abitanti di Cirella (Reitano B., 2001, pag. 235).

Il processo produttivo dell'estrazione di fibra di ginestra era piuttosto lungo, complesso e soprattutto molto faticoso, anche perché alcune fasi erano svolte in prossimità delle fiumare; dunque alla fatica delle varie attività produttive si aggiungeva il logoramento del trasporto della materia prima, quasi generalmente in testa, con il solo supporto del cercine e a piedi scalzi, data la diffusa povertà che affliggeva la maggior parte della popolazione.

Le varie fasi possono essere così sintetizzate:

1. raccolta delle vermene più lunghe e più grosse, nel mese di settembre, alle prime piogge, necessarie per approvvigionare di acqua, le fiumare, solitamente secche, nei mesi estivi;
2. pulitura di eventuali rametti secchi e preparazioni di mazzetti di circa 10 cm di diametro, legati con una vermena;
3. bollitura, in acqua, per circa 15-30 minuti, al fine di ammorbidirle;
4. assemblaggio in fascine da portare alla fiumara, sull'asino o in testa;
5. apposizione, in pozze piuttosto riparate dalle eventuali piene e copertura con pietre in modo che non galleggiassero; vi si lasciavano circa 8 giorni;
6. lavaggio accurato e apposizione nella sabbia per la strofinatura con i piedi. Così facendo la parte esterna si staccava dal fusto interno piuttosto legnoso, che era usato, per accendere il fuoco (come sostituto di carta, cartone, o dell'allora inesistente diavolina);
7. sistemazione della parte verde, in sacchi, per il lavaggio; quindi asciugatura, sui sassi. Quindi, su una pietra larga, si percuoteva con una speciale mazza, per 5/10 minuti girandola diverse volte;
8. sciacquatura accurata e ripetuta. Asciugatura e trasporto a casa;
9. pestatura, sull'uscio di casa, con una mazza più piccola, per eliminare altre impurità e ammorbidirla;
10. carminatura con le mani;
11. "pettinatura" effettuata con uno scardasso fisso e uno mobile;
12. filatura e produzione delle matasse con il supporto dell'arcolaio;
13. copertura delle matasse con lisciva, ai fini della sbiancatura. Dopo una notte, risciacquo, asciugatura e tessitura;
14. coloratura delle matasse con coloranti industriali o coloranti naturali, quali il mallo delle noci o le bucce di melagrana;
15. tessitura, per la produzione di biancheria da letto e da tavola, asciugamani e coperte di pregevole fattura.

La separazione della fibra avveniva generalmente nel pomeriggio e di sera, quando tutte le altre incombenze domestiche e agricole erano state compiute e soprattutto si svolgevano in compagnia di amici, parenti e vicini di casa. Le fasi più movimentate, come ad esempio quella di strofinare i fusti con i piedi erano delegate ai bambini e ai ragazzi che apprezzavano e gradivano l'aspetto ludico dell'operazione.

La produzione di fibra di ginestra aveva, in sé, come tutte le lavorazioni artigianali, una componente sociale molto importante: era "come un rito propiziatorio" (Reitano B., 2001, pag. 135) e assumeva il ruolo di "condimento necessario dell'esistenza e la dimensione del lavoro inteso come compagnia alla solitudine" (Beniscelli, pag. 211).

La produzione della fibra di ginestra fu dismessa, nella prima metà degli anni '60, in concomitanza dell'avvento e della diffusione delle fibre acriliche (terital, viscosa, nylon, ecc.)

 ISBN: 978-2-931089-30-9

(Brooks, Fletcher, Francis, Rigby, Roberts, 2017) e soprattutto in ragione del fatto che il miglioramento delle condizioni economiche, ha permesso che le donne si affrancassero da un lavoro decisamente lungo e faticoso.

L'apparizione e la diffusione delle materie plastiche e delle fibre artificiali furono accolte con grande entusiasmo, date le peculiarità di leggerezza, praticità, economicità: nessuno, o quasi, allora, percepì, o comunque richiamò l'attenzione su quanto danno avrebbero arrecato all'ambiente. Nell'arco di pochi lustri, l'uomo ha provocato danni notevolissimi e irreparabili. Paradossalmente, fino agli anni '50, dunque fino alla produzione della ginestra, pochissime persone avevano l'acqua in casa; nell'arco di poco più di 20 anni, quelle stesse persone si sono provveduti di tutti i confort e le loro case si sono riempite del necessario e soprattutto del superfluo, ma non hanno più potuto disporre dell'acqua da bere, ossia dell'elemento fondamentale e più importante per la vita.

Fig. 1. *Lavorazione della ginestra, in una cartolina risalente al 1935 circa*

L'obiettivo di questa ricerca è la valutazione della sostenibilità (Fletcher, 2015; Thorisdottir, Johannsdottir, 2020) della produzione di fibra di ginestra, al fine di valutare se e come, vestiti alla moda create con tale fibra sono attrattivio per le partecipanti di miss Italia (Joy, Sherry, Venkatesh, Wang, Chan, 2012), e la conseguente sostenibilità (Danyan, 2012; Chang, Jai, 2015; Greco, De Cock, 2021; Zhang, Zhang, Zhou 2021; Niinimäki, Peters, Dahlbo, Perry, Rissanen, Gwilt, 2020; Brewer, 2019; Long, Nasiry, 2022). A tal fine, dunque, si è studiato il comportamento d'acquisto delle ragazze in relazione a vestiti, accessori, calzature, intimo e materiali con cui i suddetti sono prodotti.

4. Metodologia della ricerca

La metodologia della ricerca prevede l'analisi bibliografica e l'elaborazione di un questionario, inviato online.

Il campione da intervistare è costituito dalle partecipanti a miss Italia, la cui età varia tra i 18 e i 30 anni (come da regolamento) per due ragioni principali:

1. la giovane età dovrebbe portare con sé una maggiore attenzione verso la tutela dell'ambiente, poiché il futuro interessa di più i giovani
2. le suddette ragazze, sono maggiormente interessate alla moda, ai vestiti, agli accessori e a tutti i materiali utilizzati per crearli.

Il campione cui è stato inviato il questionario è stato piuttosto copioso (570 ragazze), ma non si è registrata una forte partecipazione: sono stati compilati 197 questionari, di cui alcuni sono stati esclusi perché non completi o con risposte evidentemente illogiche. Sono stati dunque considerati validi 175 questionari.

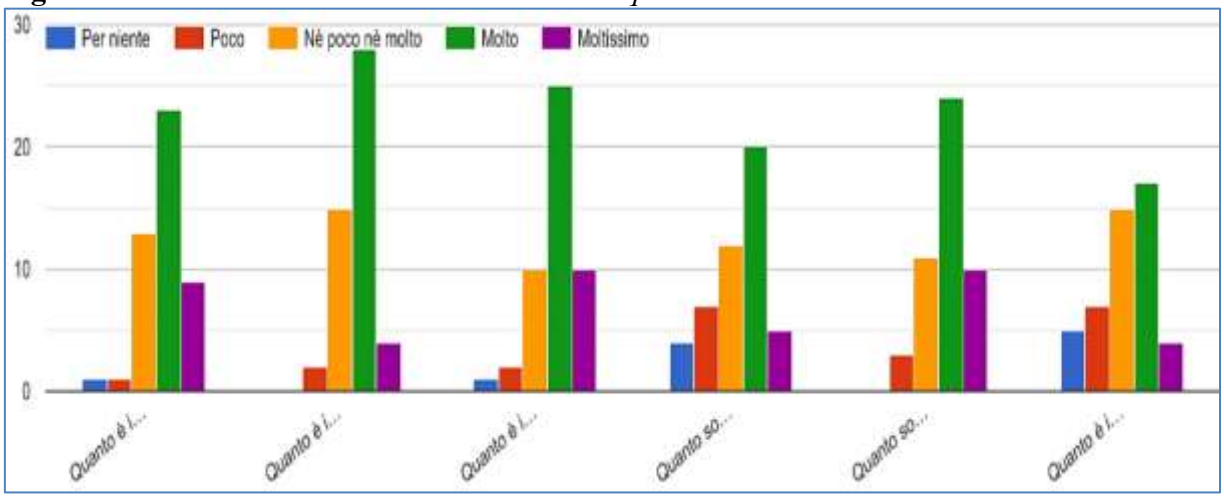
4.1 Analisi dei risultati

I dati collezionati evidenziano il livello di conoscenza della ginestra. A tal proposito, solo il 26% delle intervistate sapeva che fino a 55 anni fa, in Italia si produceva la ginestra; solo l'8,2% sapeva che si produceva nella regione in cui è nata e/o vive.

Varie domande sono state incentrate sul processo d'acquisto e sulle motivazioni che spingono a ciò. I risultati più rilevanti sono sintetizzabili in:

- il 68% delle intervistate dichiara che effettua i suoi acquisti, è influenzata nel 68% dei casi, dalle caratteristiche del bene; il 32% è molto influenzato dal marchio.

Fig. 2. *Fattori su cui si basano le decisioni d'acquisto.*

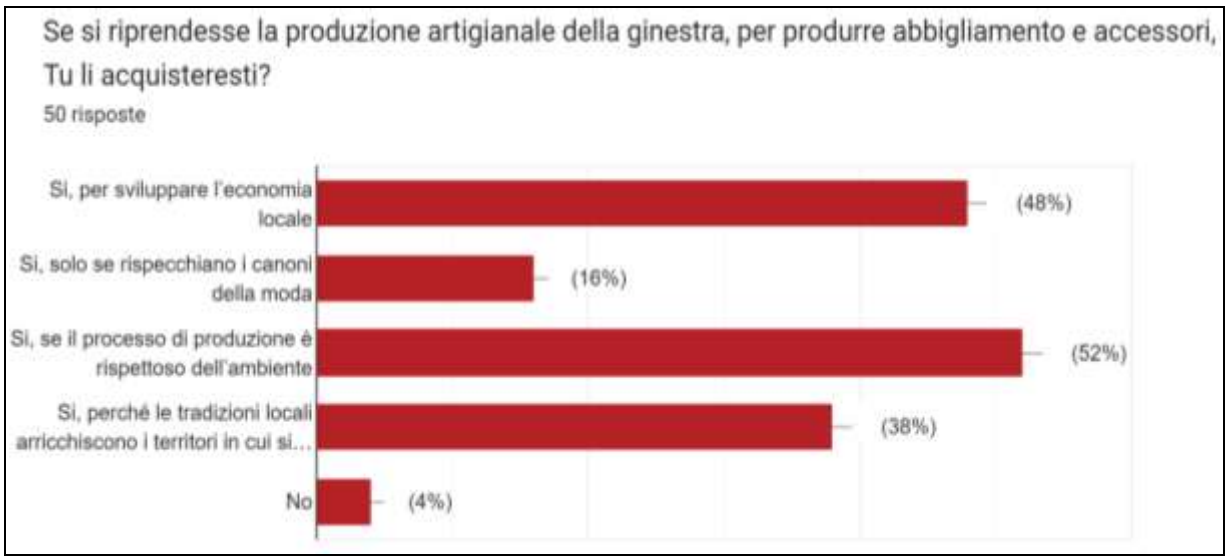


1. Quanto è importante, per Te, l'origine delle materie prime di abbigliamento, intimo e accessori?
2. Quanto è importante, per Te, il prezzo di abbigliamento, intimo e accessori?
3. Quanto è importante, per Te, il modello e/o allo stile di abbigliamento, intimo e accessori?
4. Quanto sono importanti, per Te, tutti gli elementi (strass, decori, fibbie, tessuti, pellami, modello, borchie, ecc.), che ne fanno un capo alla moda?
5. Quanto sono importanti, per Te, le azioni che le aziende mettono in atto per la tutela dell'ambiente?
6. Quanto è importante, per Te, il brand di un capo di abbigliamento, di intimo e di un accessorio?

La Fig. 2 evidenzia che le intervistate dichiarano grande attenzione e interesse per quanto riguarda:

- l'origine delle materie prime;
- il prezzo;
- il modello e/o lo stile;
- le materie prime (tessuti, pelle, decorazioni, borchie, strass, fibbie ecc) che ne fanno un oggetto alla moda;
- le attività implementate dalle aziende, a favore dell'ambiente;
- il marchio.

Fig. 3. *Propensione all'acquisto di prodotti di ginestra, in relazione alle finalità auspicate.*

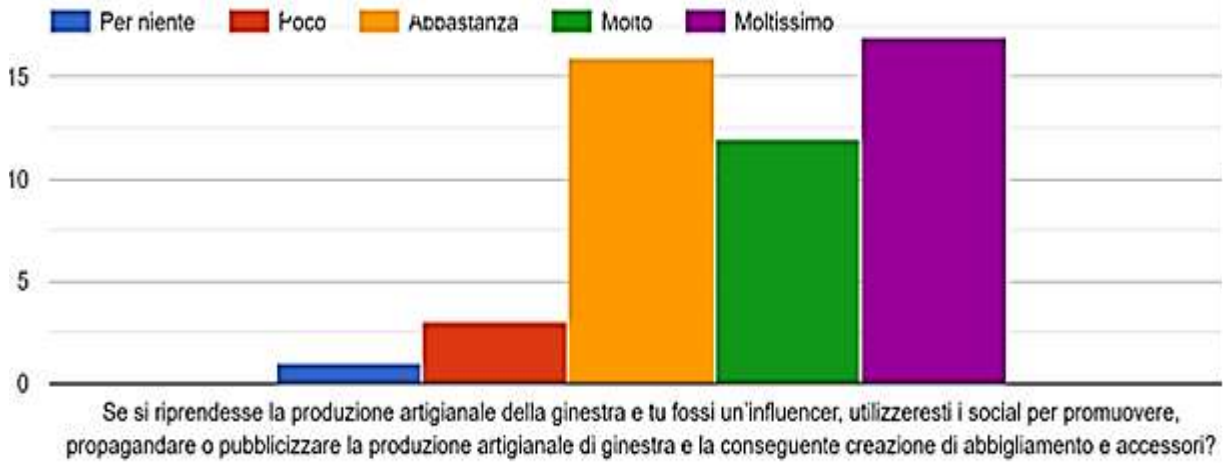


Interessanti risultano i comportamenti delle intervistate, nel caso la produzione di fibra di ginestra riprendesse e fosse utilizzata per la realizzazione di abbigliamento, accessori ecc. Esse dichiarano (si veda Fig. 3) che acquisterebbero i suddetti prodotti,
- se il processo produttivo è rispettoso dell'ambiente (52%);
- per sviluppare l'economia locale (48%);
- perché le tradizioni locali arricchiscono il paniere di attribute dei territori in cui sono implementate e costituiscono una significativa risorsa economica e turistica.

Dallo stesso istogramma, si ricava un'informazione di rilievo: il 16% delle intervistate acquisterebbe beni contenenti fibra di ginestra, solo se rispettano i dettami della moda.

Il 4%, infine, dichiara che non li acquisterebbe.

Fig. 4. *Ruolo di influencer e comunicazione della fibra di ginestra.*



La Fig. 4, infine, dà utili indicazioni in merito alla propensione che le ragazze avrebbero nel diffondere la cultura della produzione della fibra di ginestra. Facendo riferimento all'attività di influenzer, tanto discutibile quanto ambìta, e utilizzando la scala di Likert, si ricava che, in misura preponderante utilizzerebbero il ruolo di influenzer per promuovere, pubblicizzare e sponsorizzare i prodotti in fibra di ginestra. Osservando le risposte in relazione alla scala di Likert in 5 livelli, è interessante vedere che la massima quantita di risposte riguarda il massimo livello e che non si registra alcun risultato per la risposta "per niente".

5. Considerazioni conclusive

Il recupero della produzione di fibra di ginestra è stato analizzato da diversi punti di vista. Prima di tutto si è voluto verificare quale sia la sensibilità delle giovani verso il tema del degrado ambientale e della sostenibilità, in relazione al loro stile di vita.

Le intervistate hanno dimostrato rilevante interesse verso il rispetto e la tutela dell'ambiente, ma non mettono, in secondo piano, la componente "moda". Ciò è più che comprensibile, visto che l'Italia e la moda italiana sono pervase di stile e bellezza, cui difficilmente le persone a ciò abituate, vogliono rinunciare. Dunque, le creazioni di/o con ginestra devono essere in armonia con i dettami della moda vigente, per essere adottati dalle giovani generazioni e poter divenire iconiche come tanti prodotti e marche italiane. Sic stantibus rebus, occorre assumare uno stile di vita che non sia espressione del consumismo, diffusosi negli opulenti anni '80 dello scorso secolo. Occorre anche riflettere sul fatto che la popolazione mondiale è in aumento e che, come auspicabile, se i popoli dei paesi non ancora sviluppati, lo saranno presto e quindi assumeranno i comportamenti di acquisto e consumo dei popoli dei paesi industrializzati, la tutela e la salvaguardia dell'ambiente saranno del tutto impossibili da attuare.

Il sistema dei valori dell'individuo dovrà essere rivalutato in modo che le nuove generazioni non siano talmente attratti, così come accade da qualche decennio, dai prodotti "fast fashion", Insomma, occorre abbandonare la logica "usa e getta" e rieducare e rieducarsi ad ammirare la "bellezza" anche e soprattutto in un paesaggio, in un quadro, in una poesia, in una scultura, in un abito che potrà essere indossato più volte e che proprio per l'accuratezza con cui è stato ideato, disegnato e creato e il tempo a ciò necessario e per le materie prime di cui è composto, trova posto in prestigiosi musei. Non per nulla il messaggio pubblicitario che accompagna le creazioni di Valentino Garavani è "Timeless".

Un altro interessante punto di vista è più squisitamente tecnico e riguarda la produzione della fibra, che ovviamente deve essere meccanizzata e ottimizzata, al fine di divenire anch'essa sostenibile.

L'industrializzazione, però, non deve portare a perdere la qualitá della lavorazione che dovrebbe avere quel vantaggio competitivo che fa scegliere la fibra di ginestra rispetto a quella sintetica. Bisogna quindi "rendere moderno" un ciclo di produzione che fino a 60 anni fa era manuale; grazie alle nuove tecnologie si può ottenere la precisione e la raffinatezza desiderata, a solo scopo estetico, ma anche fondamentale per ulteriori e non facili fasi produttive, quali ad esempio la stampa. E, ovviamente, ai fini della sostenibilità, deve essere prestata attenzione al recupero degli scarti di lavorazione. occorre anche porre attenzione agli scarti di lavorazione.

A tal proposito occorre precisare che la fibra di ginestra, oltre a essere particolarmente resistente, detiene un interessante fattore di competitività: è piuttosto refrattaria a trattenere le macchie. Ciò la rende particolarmente adatta a due segmenti di mercato: le imprese della ristorazione e i bambini

Infine, la produzione della ginestra è stata studiata, e deve essere studiata, in un'ottica puramente turistica, poiché fa parte della storia dei luoghi in cui era praticata e di cui accresce il paniere di attributi, creando valore aggiunto ed enfatizzando il *genius loci*. Quest'ultimo racconta anche di valori sociali, poiché le operazioni erano svolte, spesso sull'uscio di casa, in compagnia e con l'aiuto di amici, parenti e vicini di casa. Le operazioni cineticamente più rilevanti erano delegate ai bambini e ai ragazzi, che apprezzavano e ne traevano divertimento. Prima dell'avvento della televisione (avvenuto in Italia nel 1954), l'intrattenimento era costituito soprattutto dai racconti che si facevano, intanto che le mani operose filavano, cardavano, tessevano, ricamavano, sferruzzavano.

L'ozio non era contemplato, nelle società contadine di circa un secolo fa, anche e soprattutto perché non potevano permetterselo, così come era loro aliena ogni altra espressione del lusso o del benessere.

Ai fini turistici, dunque, è proficuo realizzare la ricostruzione del processo produttivo, o anche un museo con gli strumenti che si utilizzavano, e soprattutto con i pregiati tessuti con cui si realizzava pregevole biancheria per la casa e per la persona.

Bibliografia

AA.VV. (1966), La Belle Epoque, Gherardo Casini Editore, Roma, 1966

Beniscelli G. (1977), Un lavoro sulla porta di casa, Artigiani di Calabria e Basilicata, SIAG, Genova

Brewer M. K. (2019). Slow fashion in a fast fashion world: Promoting sustainability and responsibility, *Laws*, 8, 24

Brooks A., Fletcher K., Francis R. A., Rigby E. D., Roberts, T. (2017), Fashion, sustainability, and the Anthropocene, *Utopian Studies*, 28(3), 482-504

Chang, H. J. J., Jai, T. M. C. (2015), Is fast fashion sustainable? The effect of positioning strategies on consumers' attitudes and purchase intentions, *Social Responsibility Journal*, 11(4), 853-867

D'orazio L., Martuscelli E., Orsello G., Riva F., Scala G., Taglialatela A., (2000), Nature, Origin and Technology of Natural Fibres of Textile Artefacts Recovered in the Ancient Cities around Vesuvius, *Journal of Archaeological Science,* 27 (9), September, 745-754

Fletcher K. (2013), Sustainable fashion and textiles: design journeys. Routledge, London

Grandi S., Vaccari A., Zannier S., (1992), La moda nel secondo dopoguerra, CLUEB, Bologna

Greco, S., De Cock, B. (2021), Argumentative misalignments in the controversy surrounding fashion sustainability, *Journal of Pragmatics*, 174, 55-67

https://cangiari.it

Istituto dell'Enciclopedia italiana (ed.), Vocabolario della lingua italiana, Vol III*, Milano, 1989

Joy A., Sherry Jr J. F., Venkatesh A., Wang J., Chan, R. (2012), Fast fashion, sustainability, and the ethical appeal of luxury brands, *Fashion theory*, 16(3), 273-295

Katović D., Katović A., Krnčević M. (2011), Spanish Broom (*Spartium junceum L.*)-History and Perspective, *Journal of Natural Fibers*, 8:2, 81-98

Long, X., Nasiry, J. (2022). Sustainability in the fast fashion industry, *Manufacturing & Service Operations Management*, 24(3)

Miles S. (1998), Consumerism-as a Way of Life, Sage, London

Niinimäki, K., Peters, G., Dahlbo, H., Perry, P., Rissanen, T., & Gwilt, A. (2020). The environmental price of fast fashion, *Nature Reviews Earth & Environment*, 1(4), 189-200

Reitano A., Fazio M. (2021), Cultura e creatività calabresi all'Esposizione internazionale delle industrie e del lavoro (Torino, 1911), in Cekani I., d'Ovidio F., Favia F. (a cura di), Up to the Roots: Tourism Sustainability, Health, Food, and Culture. vol. 2, 155-166, Tirana, AL; Brussels, BE: International Academic Research Center Str. (Tirana, AL) & ETQA (Brussels, BE)

Reitano A., Taylor D., Greig K., Sposato C. (2014), Sustainability, eco-innovation and technology - an Italian perspective, *International Journal of Technology Marketing*, 9(3), 270-287

Reitano A., *Tracciabilità dei prodotti agroalimentari e corporate social responsibility*, n. ½, 2013, 27-40

Reitano A. (2012), Il ruolo della tracciabilità nella commercializzazione dei prodotti agroalimentari, Egea, Milano

Reitano A., Greig K., Sposato C., Taylor D. (2012) *Green Entrepreneurs: an Italian Perspective*, *EuroMed Journal of Business*, in: Building New Business Models For Success Through Competitiveness and Responsibility, Glion-Montreux, Switzerland, October 4th-5th, EuroMed Press, 624-637

Reitano A., Zinno M. (2006), La Calabria: da risorsa a prodotto, in Reitano A., Franco M. (ed.), Il territorio: da risorsa a prodotto, FrancoAngeli, Milano, 15-31

Reitano B., (2001), Cirella in Calabria Ultra Prima, Arti Grafiche Edizioni, Ardore

Thorisdottir, T. S., Johannsdottir, L. (2020), Corporate social responsibility influencing sustainability within the fashion industry. A systematic review. *Sustainability*, 12(21), 9167

Zhang, B., Zhang, Y., & Zhou, P. (2021). Consumer attitude towards sustainability of fast fashion products in the UK. *Sustainability*, 13(4), 1646

Ringraziamenti

La ricostruzione accurata dell'antico ciclo di produzione è stata condotta grazie alla gentile collaborazione della signora Giuseppina Reitano, che ci ha trasmesso i suoi preziosi ricordi.
La collezione dei dati è stata resa possibile dalla cortese collaborazione dell'avv. Carmelo Ambrogio e della signora Linda Suriano, rappresentanti della Carly Fashion Agency e agenti regionali di Miss Italia Calabria.

ISBN: 978-2-931089-30-9

Monitoring and production of a plant of earthworm composting for the treatment of organic waste

Domenico ALBANO*
Calabria Region - Italy

Antonio DOMINIANNI
Municipality of Catanzaro - Italy

Abstract: The following study concerns the monitoring data of a company authorized to dispose of compostable municipal waste, which uses the composting technique for the transformation of organic waste into soil improver, according to Legislative Decree 75/2010. For about three years, analyzes and checks were carried out at an urban waste management plant, authorized in accordance with the provisions of art. 208 of Legislative Decree 152/06 and subsequent amendments, located in the province of Crotone.
From the chemical investigations carried out on the "end of waste" raw material output, the results emerged that will be shown below but highlighting what is the return of a material within the production and economic cycle of a waste.
The waste in question consists of organic waste, which is very particular and has a great environmental impact. The above represents the real concept now known as *Circular Economy*.
Organic waste, according to the latest estimates, constitutes over 20% per capita of the waste produced, for a total of over 0.1 Mg / year per person, they represent an important slice of the entire waste management cycle. This waste generates considerable quantities of leachate, which is very difficult to treat as well as significant quantities of odorous emissions which produce a very negative return on the territory.
The worm composting process represents a valid waste treatment and management system, in fact it allows the production of soil improver particularly suitable for agricultural crops of any type. Subsequently, the quantities of waste produced EER 191212 and those of raw material will be indicated with the relative analyzes of the finished product and re-entering as a soil improver according to Legislative Decree 75/2010.
After a description of the plant and its operation, the monthly data on the treatment of the wet fraction and the production of soil improver will be illustrated.

Keywords: circular economy; organic waste; treatment and production; monitoring

Introduction

The following study concerns the monitoring data of a company authorized to dispose of compostable municipal waste, which uses the composting technique for the transformation of organic waste into soil improver, according to Legislative Decree 75/2010.
For about three years, analyzes and checks were carried out at an urban waste management plant, authorized in accordance with the provisions of art. 208 of Legislative Decree 152/06 and subsequent amendments; located in the province of CROTONE.

* Corresponding Author: d.albano@regione.calabria.it

From the chemical investigations carried out on the raw material outgoing "end of waste", the results emerged that will be shown below, highlighting what is the return of a material within the production and economic cycle of a waste. The waste in question consists of organic waste, which is very particular and has a great environmental impact. The above represents the real concept now known as CIRCULAR ECONOMY.

Organic waste, according to the latest estimates, constitutes over 20% per capita of the waste produced, for a total of over 0.1 Mg / year per person, they represent an important slice of the entire waste management cycle.

This waste generates considerable quantities of leachate, which is very difficult to treat as well as significant quantities of odorous emissions which produce a very negative return on the territory. The worm composting process represents a valid waste treatment and management system, in fact it allows the production of soil improver particularly suitable for agricultural crops of any type. Subsequently, the quantities of waste produced EER 191212 and those of raw material will be indicated with the relative analyzes of the finished product and re-entering as a soil improver according to Legislative Decree 75/2010. After a description of the plant and its operation, the monthly data on the treatment of the wet fraction and the production of soil improver will be illustrated.

Research objectives

The aim of the research is to evaluate the benefits deriving from the double action of reducing waste to be disposed of in landfills, re-using them in the production cycle of humus generation from worm composting plants.

The goal is to implement a circular economy process by giving valuable help to the environment against soil depletion and consequent desertification.

Materials, methods and tools

The collected organic waste, after being transported and having undergone the control, weighing and recording operations, arrives in the reception area of the plant. This area has an area paved with industrial-grade waterproof concrete. Here a first visual check of the delivered material takes place which is subsequently deprived of the bags and sacks, if not compostable, by means of a bag opener machine and eventually removed and separated any foreign material.
The next operation takes place under the roof, it is the screening-shredding with a special mechanical machine. Through a special network, the liquid eluates generated by the waste are collected in a tank in this phase, protected from atmospheric agents. After the necessary chemical analyzes they can be used to provide useful material and to humidify the vermicomposting yards.

At this point the material is ready to be volumetrically reduced by means of an appropriately equipped roto-separator and grinder capable of considerably reducing the size of the waste to make it more easily and quickly digestible by earthworms. The machine is also located under the canopy on the waterproofed area and the liquids produced during the "wringing" are sent to the aforementioned tank.

The product is moved into the ripening septa, concrete tanks with overlying PE or other plastic material, supported by a metal structure without side walls to allow ventilation, also equipped with sprinklers for the humidification of the waste.

The retention time for maturation is about 30 days, then the product is discharged into the litter of earthworms that come into action by feeding on the organic material and subsequently

through their excrements decompose and transform the waste. After about 45 days under normal conditions, the humatic and now stable material (soil conditioner) is produced. This product will then be analyzed and responding to the provisions of the regulations (Legislative Decree 75/2010), it can be marketed and used in agriculture.

The construction of the system does not require particular soil or environmental conditions. The systems are easily adaptable to different climatic conditions.

Instruments

The feeding provided for earthworms inside the plant is generally given by manure, grass clippings, agricultural waste, cardboard paper etc. plant residues of any nature, all of which are organic in nature.

Everything is stored in heaps and from there taken to the litter to feed the earthworms every 10 days. Alternatively, it can be distributed directly on the litter on the same day of collection, so as not to create deposits.

Figure: *storage and handling area with mechanical means*

The plant requires a concrete platform for industrial plants and relative wells for collecting leachate and rainwater, which are used to wet the earthworms themselves. The access road for trucks is essential.

For an industrial plant, a minimum of 3000 to a maximum of 5000 m^2 is required.

It is also possible to create domestic systems: 1 or 2 square meters are enough even in a corner of the vegetable garden or garden.

It is necessary to set up areas for receiving, storing and mixing the incoming material, in order to prepare an optimal feeding for earthworms. In the storage area of the material entering the process, it is necessary to have a tractor with a shovel or manure spreader wagon, which is used to turn the heaps and to distribute the feed on the litter.

It is therefore necessary to have water available, not necessarily drinkable, but also stagnant or brackish. Additional equipment necessary for the production process are forks, rakes, wheelbarrows and canes necessary for wetting if necessary.

For the processing of Humus, a shredder, screen, ribbons and dispenser are required.

Finally, it is necessary to use a finished product storage area, covered, pending subsequent processing for sale.

Earthworms must be fed every 10 days and produce humus in 6 months. The humus produced is collected and can be left to mature in heaps outdoors or can be sold directly.

Results - The Product obtained

The compost thus obtained is a natural organic soil improver (Ministerial Decree 30 December 1986 amendments and additions to the annexes to the law 19 October 1984 n. 748 concerning "New regulations for the regulation of fertilizers) coming from the biological transformation of natural organic substances of vegetable origin and / or animal thanks to the decomposition action carried out by earthworms. Practically the action of the earthworm is in full a recovery operation R3 recycling / recovery of organic substances, provided for in Annex C to Part IV of Legislative Decree 152/06 and subsequent amendments.

Table 1. *Production in year 2018*

MENSILE	*Rifiuti in entrata*	*Rifiuti prodotti*	*end of waste*
	CER 200108 Mg.	*CER 191212 Mg.*	*Ammendante Mg.*
GEN	190,62	32	49,65
FEB	195,2	34,4	50,2
MAR	201,43	35,99	51,4
APR	210,67	38,4	53
MAG	215,4	39,5	53,4
GIU	239,27	41,45	62,6
LUG	257,56	46,56	68,56
AGO	320,45	54,48	80,45
SET	280,35	48,4	71,2
OTT	245,4	45,9	62,15
NOV	205,2	36,9	51,2
DIC	278,45	40,89	66,21
Totale	**2840**	**494,87**	**720,02**

Table 2. *Production in year 2019*

MENSILE	*Rifiuti in entrata*	*Rifiuti prodotti*	*end of waste*
	CER 200108 Mg.	*CER 191212 Mg.*	*Ammendante Mg.*
GEN	197,62	26,78	58,78
FEB	188,2	29,47	56,2
MAR	198	29,8	59,4
APR	214,67	30,4	62,34
MAG	217,4	31,5	63
GIU	226,31	36,9	68,76
LUG	260	38,7	79,88
AGO	325,75	49,8	96,5
SET	285,8	40,8	85,46
OTT	235,4	38,9	77,79
NOV	215,2	31,27	61,7
DIC	284,65	40,89	85,36
Totale	**2849**	**425,21**	**855,17**

Table 3. *Production in year 2020*

MENSILE	*Rifiuti in entrata*	*Rifiuti prodotti*	*end of waste*
	CER 200108 Mg.	*CER 191212 Mg.*	*Ammendante Mg.*
GEN	198,6	17,8	61,78
FEB	187,21	19,4	58,2
MAR	188,78	21,9	66,4
APR	215,55	22,61	69,34
MAG	221,4	22,59	88
GIU	228,31	24,19	91,76
LUG	254,4	26,87	96,88
AGO	320,85	35,98	125,5
SET	288,9	30,9	105,46
OTT	239,5	23	93,79
NOV	226,21	24,7	90,7
DIC	280,29	30,06	102,3
Totale	**2850**	**300**	**1050,11**

The final product (end of waste) appears as a soil with a fine consistency which, after the necessary analyzes, can contribute to improving the physical, chemical and biological characteristics of the soil. From a biological point of view, the organic substance contained makes it possible to develop a large number of microbial strains of the soil which with their activity exert a positive influence on plant growth.

Employment and interactions with other sectors

FRESH: after 2 - 3 months it is used for ecological weeding, makes the soil soft, maintains humidity in summer and warm in winter; to be buried as manure.
READY: after about 4 - 5 months: it is an intermediate worm compost that is good for burying it during digging and replaces manure;
MATURE: after about 6 - 7 months, as a soil in all its forms, 100% natural and ecological, ready to assimilate.

It can also be used:
- directly in the company for various productions;
- by flower growers as a matrix for their own mixtures for the production of soil;
- by local administrations to fertilize flower beds, parks and gardens;
- for organic farming.

Interactions with other sectors
The process lends itself to integration with a number of sectors both as regards the procurement of incoming raw materials and as regards the use of the output product.

In detail, the raw material is not exclusively attributable to the organic fraction of separate waste collection, but could also derive from farm and agricultural waste (mowing and pruning, raw materials in a state of decomposition, waste (or better by-products) from the processing industry agri-food.

As for the outputs, the composition of humus lends itself well not only to ordinary use as a soil improver to replace chemical fertilizers in agriculture, but also in contrasting desertification and impoverishment of soils, or in environmental restoration as upper layers in coverage packages.

Conclusions and results, future developments

The data are values actually produced by the company in the years 2018, 2019 and 2020 in relation to incoming organic waste with code EER 20 01 08 "Biodegradable waste from kitchens and canteens" in entry and after treatment in the earthworm plant, yes obtain about 25% of material by weight of soil improver, with a waste of 17.5% with code 19 12 12 Other waste (including mixed materials) produced by the mechanical treatment of waste, other than those referred to in item 19 12 11" these values, as shown in the table, refer to 2018.

For 2019, thanks also to greater staff experience, the values have improved, in relation to the entry of the EER 20 01 08 (Mg. 2849) waste 855 Mg were produced. of soil improver equal to about 30% of the incoming product, with a difference (EER 19 12 12) of 15% referring to the entry into the plant.

Finally, for the year 2020, thanks to a new tablecloth machine and a better waste maturation system before sending it to the litter, the following values were obtained on a quantity of waste equal to Mg. 2850, Mg. 1150 are of soil improver, equal to about 40% with a waste produced equal to about Mg. 300, just over 10%.

Overall, it can be said that worm composting plants do not require high initial investments, and in any case have a positive impact on the circular economy of "organic waste", simplifying its transformation into a natural process.

The advantages of this operation can be summarized in several points.
- Project of immediate feasibility, as it does not require special interventions.
- It does not require large investments.
- Ease of approach and undoubted utility of the project (waste has always been recycled in agriculture).

- Direct involvement of the citizen and approach to environmental problems: it is a "practical example" and concrete of intervention against the various forms of pollution.
- General control of the situation and undeniable image return.
- Excellent investment, economic benefits, less expenses.
- It can be proposed as an educational path for schools (inserted in a circuit).

Currently, it is a necessity, not just a need, to recycle as much waste as possible, to be carried out as a real example to demonstrate that it can (as well as must) be recovered, and not always and only destroyed.

System also advocated by the EEC for closing the supply chain.

An earthworm farm is always very interesting, and with great potential.

Figure: *Ecological recycling process with earthworms*

Future developments

Future research developments include how the variation in the composition of the incoming raw material can affect the chemical and physical characteristics of the humus produced. This aspect is also interesting from a perspective of "reconstitution" of the chemical composition of soils that could be subjected to soul washing processes.

Furthermore, it is advisable to study its effects in different types of soil in order to vary its permeability and prevent any hydrogeological instability phenomena.

ISBN: 978-2-931089-30-9

Riflessioni sulla "giustizia climatica", tra etica e diritto

Giovanni TARANTINO*
Università del Salento - Italia

Abstract: The worsening of the phenomenon of Climate change, if on the one hand it has seen social activism led by more or less organized pressure groups with an ecological orientation, on the other hand it has thrown new light on many ethical-legal issues, with which legislators and scholars have had to confront.
For the former, this contribution will reflect, from an ethical-legal perspective, both on the commitment made in the writing of numerous charters of international law (think, among many, of the United Nations Framework Convention on Climate Change (UNFCCC, 1992), the Kyoto Protocol (1997) or the Paris Agreement (2015), and, in the context of domestic law, on the recent news of articles 9 and 41 of the Italian Constitution. he reminds here that the issue of climate change is not considered directly, but remains underlying the greater constitutional protection provided to biodiversity, the environment and ecosystems by the new constitutional provisions.
For scholars, however, by limiting the reflections to the field of Philosophy of law, we will discuss some of the most recent works that have been proposed on the subject of the recognition of a new "climate justice" and of a possible fundamental human right "to climate".

Keywords: Climate change, Climate justice, Ethics,

SOMMARIO: *1- La giustizia climatica all'interno della giustizia intergenerazionale. 2. La problematicità di riconoscere l'intergenerazionalità: sul piano etico e su quello giuridico. 3. La "giustizia climatica" come limite alla hybris faustiana. Il monito di Sergio Cotta.*

1. La giustizia climatica all'interno della giustizia intergenerazionale.

Con l'intento di fornire una definizione che accompagni le riflessioni qui proposte, si precisa, preliminarmente, che per "giustizia climatica" si deve intendere una locuzione che, in sintesi estrema, indica quell'insieme di obblighi di giustizia, etici prima, poi giuridici, i quali, se rispettati, permettono che le future generazioni ricevano un clima non alterato dalle azioni umane poste in essere dalle generazioni che vivono nel presente. In altre parole, con questa locuzione si chiede alle generazioni presenti di considerare che vi è una responsabilità per le azioni che esse compiono, in quanto tali azioni, alterando irreversibilmente il clima, possono provocare danni alle future generazioni che abiteranno il Pianeta, le quali, di conseguenza, non potranno più godere di condizioni climatiche favorevoli, almeno quanto quelle che hanno accompagnato la vita delle generazioni che le hanno precedute.

* Corresponding Author: giovanni.tarantino@unisalento.it

La definizione di giustizia climatica non è agevole. Carducci dice al riguardo, ad esempio, che: «Per aversi "contenzioso climatico" non si deve necessariamente sottoporre a giudizio l'obbligazione climatica né atti o fatti considerati illeciti per il loro concorso agli effetti catastrofici del cambiamento climatico. Può essere, e il più delle volte è, altro: un determinato atto da impugnare; un determinato evento da eccepire come fatto illecito; un determinato comportamento ritenuto negligente; un determinato interesse pretermesso da un determinato procedimento; un determinato impatto; insomma altro, al cui interno il clima assurge ad "argomento" di rafforzamento della pretesa giudiziale, non invece a oggetto unico e assorbente del giudizio»[1].

A ben riflettere, quella della responsabilità verso le future generazioni, che in queste pagine si sta declinando nel campo della tutela dell'ecosistema, e più specificamente, con riguardo alla possibile alterazione del clima, è, però, una problematica molto più ampia. Anche se, è opportuno ricordarlo sin dall'inizio di queste riflessioni, sia le categorie dell'etica tradizionale, sia quelle giuridiche, stentano ad accettare il principio di responsabilità intergenerazionale, in quanto sino alla contemporaneità, se si è accettato un principio di responsabilità, questo è stato considerato riferibile solo a chi fosse "presente", a chi potesse interagire facendo sentire le proprie esigenze e le proprie istanze. E, com'è evidente, le generazioni future, non esistendo ancora, non possono difendere i propri interessi o chiedere la tutela dei propri diritti. E' questo il problema del *presentismo*, di cui, fra gli altri ha parlato Thompson[2].

2. La problematicità di riconoscere l'intergenerazionalità: sul piano etico e su quello giuridico.

Va detto, però, che ci sono comunque stati tentativi di accogliere il principio di responsabilità intergenerazionale all'interno della riflessione etica. Per esempio un tentativo (forse quello meglio sostenuto) è stato fatto dall'*etica della responsabilità* di Jonas, un altro è quello nato all'interno della teoria etica dell'utilitarismo con Pontara, infine, c'è stato quello neocontrattualista di Rawls[3]. Tentativi che, comunque, non hanno ancora portato alla piena accettazione di questo principio.

Anche sul piano del diritto si è tentato di riconoscere e dare attuazione alla responsabilità intergenerazionale, riferita all'ambito della tutela dell'ambiente, e già da alcuni decenni. Molte Dichiarazioni di ambito internazionale hanno infatti proclamato tale principio. A questo proposito, giova evidenziare come il carattere metanazionale di una proclamazione del principio di responsabilità rivolto alla tutela dell'ambiente ha una duplice (ed indispensabile) valenza. Vale sia nel rapporto intragenerazionale e sia in quello intergenerazionale. Riguardo alla prima valenza, va compreso che non sarebbe, infatti, utile una dichiarazione di principio che chiedesse una tutela giuridica dell'ambiente nel ristretto ambito dei confini di un singolo Stato: limitare, infatti, per restare al discorso che qui si porta avanti, l'inquinamento in un singolo Stato non preserverebbe quello stesso Stato dall'inquinamento che potrebbe raggiungerlo comunque, perché prodotto da azioni inquinanti poste in essere, ad esempio, da uno Stato confinante. Riguardo alla seconda valenza, cioè al rapporto intergenerazionale, invece, un maggiore rigore giuridico in tema di tutela ambientale imposto ad una generazione, e non a esempio anche a quella immediatamente successiva, sarebbe inutile, perchè non garantirebbe la conservazione dell'integrità dell'ambiente per le generazioni future, più lontane a venire.

[1] M. CARDUCCI, *La ricerca dei caratteri differenziali della "giustizia climatica"*, in *Saggi – DPCE online*, 2020/2, p. 1357.
[2] Cfr. D. THOMPSON, *In rappresentanza delle generazioni future. Presentismo politico e amministrazione fiduciaria democratica*, in "Filosofia e questioni pubbliche", (12) 1, 2007, pp. 13-29.
[3] I riferimenti alle opere di questi autori si daranno in bibliografia. Per un inquadramento ragionato ed esaustivo della questione si rinvia a F. G. MENGA, *Etica intergenerazionale*, Brescia, Morcelliana, 2021.

D'altra parte, nello specifico, tra i Documenti internazionali in cui è presente un riferimento (più o meno esplicito) alla responsabilità intergenerazionale, rilevano moltissimo proprio quelli che si riferiscono alla tutela globale dell'ambiente (ed anche alla conservazione dell'equilibrio climatico). Qui se ne ricordano solo alcuni tra i più rilevanti. Ad esempio rileva la *Dichiarazione di Stoccolma*[4], in cui si legge, nel Principio 1, che «L'uomo ha un diritto fondamentale alla libertà, all'eguaglianza e a condizioni di vita soddisfacenti, in un ambiente che gli consenta di vivere nella dignità e nel benessere, ed è altamente responsabile della protezione e del miglioramento dell'ambiente davanti alle generazioni future». Poi, è opportuno ricordare la *Dichiarazione di Rio de Janeiro sull'ambiente e lo sviluppo*[5], nella quale, nel Principio 3, si legge «Il diritto allo sviluppo deve essere realizzato in modo da soddisfare equamente le esigenze relative all'ambiente ed allo sviluppo delle generazioni presenti e future». Ancora, per la responsabilità intergenerazionale ci si può riferire anche ai Principi della *Dichiarazione di Johannesburg sullo sviluppo sostenibile*, nei quali è costante il riferimento al futuro. Soprattutto, però, per il contrasto al cambiamento climatico, non si può non menzionare il documento forse più attinente alla "giustizia climatica", cioè la *Convenzione quadro delle Nazioni Unite sui cambiamenti climatici* (UNFCCC), che è derivata dalla ricordata *Conferenza delle Nazioni Unite su ambiente e sviluppo* del 1992. Ma il riferimento deve andare anche all'*Accordo di Parigi* (che è un piano d'azione volto a limitare il riscaldamento globale - prodotto dalla COP 21) e al *Protocollo di Kioto* (mirato a ridurre la quantità di emissioni di *gas serra* da parte dei singoli Stati - prodotto dalla COP 3). Anche questi due ultimi Documenti, per inciso, sono diretta conseguenza dell'UNFCCC, che ha previsto che dovessero periodicamente svolgersi le COP (Conferenze della Parti) tra gli Stati firmatari, con l'obiettivo, in sintesi, di dare continua attualizzazione alle misure di contrasto al cambiamento climatico. Anche se si deve sottolineare che, nonostante i tanti documenti sulla tutela ambientale in generale, e su quella ambientale in particolare, «Il clima in sé, a differenza dell'ambiente, non conosce una propria definizione giuridica, né a livello di diritto internazionale né a livello di diritto domestico e neppure a livello di formante giurisprudenziale. Tale silenzio, tuttavia, non realizza una lacuna, bensì un rinvio alla realtà dei fatti, in quanto il clima coincide con la più importante funzione ecosistemica di regolazione di tutti i processi di interazione tra i viventi»[6].

Ma, come accennato all'inizio, deve considerarsi che, a detta di chi scrive, a monte dei Documenti prima menzionati che accettano l'esistenza (quando non la proclamano) della responsabilità intergenerazionale relativa alla tutela dell'ambiente ed alle problematiche legate al clima, c'è una responsabilità più ampia, che non riguarda solo i temi ambientali, ma che è riferibile anche a molte altre problematiche, come quelle dell'economia, della bioetica, delle applicazioni dell'intelligenza artificiale, ecc. E tale responsabilità intergenerazionale più ampiamente intesa è stata, già da alcuni decenni, proclamata nella *Dichiarazione sulla responsabilità delle generazioni presenti verso le generazioni future*[7]. Documento questo che non ha, però, carattere giuridicamente vincolante. Non lo ha, ma ha, sul piano assiologico, capacità "orientativa" per i singoli legislatori statali. Non si può negare, infatti, che ai principi in essa contenuti possa essersi ispirato, ad esempio, il legislatore italiano quando, all'inizio di quest'anno, ha novellato gli articoli 9 e 41 della Costituzione, inserendo (direttamente nel primo, indirettamente nel secondo) il principio di responsabilità delle generazioni presenti verso quelle future. Nel nuovo terzo comma dell'art. 9 (comma aggiunto con questa novella) si legge, infatti, che la Repubblica: "Tutela l'ambiente, la biodiversità e gli ecosistemi, anche nell'interesse delle *future generazioni*. La legge dello Stato disciplina i modi e le forme di tutela degli animali".

[4] Documento prodotto dalla ONU - *Conferenza delle Nazioni Unite sull'ambiente umano* del 1972.
[5] Documento che è derivato dalla ONU - *Conferenza delle Nazioni Unite su ambiente e sviluppo* -1992.
[6] M. CARDUCCI, *La ricerca dei caratteri differenziali della "giustizia climatica"*, op. cit., pp. 1360-1361.
[7] UNESCO, *Dichiarazione sulle responsabilità delle generazioni presenti verso le generazioni future*,12 novembre 1997.

Comunque, si deve ricordare anche, per completezza, che un precedente di rango costituzionale dell'accoglimento del principio di responsabilità intergenerazionale si era avuto già con la sua introduzione nella Costituzione tedesca. Infatti, in questa, l'art. 20 sancisce che: «Lo Stato tutela, assumendo con ciò la propria responsabilità nei confronti delle generazioni future, i fondamenti naturali della vita e gli animali mediante l'esercizio del potere legislativo, nel quadro dell'ordinamento costituzionale, e dei poteri esecutivo e giudiziario, in conformità alla legge e al diritto»[8].

Se ne può concludere, per il discorso che si porta avanti in queste brevi riflessioni, che di un agire responsabile delle generazioni presenti verso quelle future non si può, ancora una volta, parlare solo riferendosi alla tutela dell'ecosistema ed alla "giustizia climatica". Di esso, invece, si ripete, si deve parlare, comunque, riferendosi potenzialmente ad una pluralità di ambiti dell'agire umano.

3. La "giustizia climatica" come limite alla hybris faustiana. Il monito di Sergio Cotta.

Dati questi necessari riferimenti preliminari, è opportuno guardare adesso con maggiore attenzione alla problematica attualissima della "giustizia climatica", riferita al fenomeno del *Climate change*, che è forse il momento più evidente della crisi ambientale. Com'è noto, tale fenomeno deriva non da fattori naturali, ma è prodotto, artificialmente, dalle azioni climalteranti umane. Ed è proprio dal fatto che vi sia l'agire dell'uomo a monte dei cambiamenti climatici in atto che può discendere, al riguardo, la proposta di un'istanza di responsabilità intergenerazionale. Istanza che dal piano della riflessione etica, ineludibilmente, si sposta su quello giuridico, come visto prima con il riferimento ai Documenti di diritto domestico e internazionale. Infatti, è proprio al diritto (o ai diritti umani, più specificamente) che si chiede di intervenire per normare queste azioni antropiche climalteranti, riducendo o, ove possibile, eliminando del tutto la potenzialità inquinante dell'agire (spesso economico) dell'uomo. Si è detto, poc'anzi, "diritti umani" perché si va sempre più avanzando la richiesta di una tutela specifica di un nuovo diritto umano: il "diritto al clima"[9]. Da cui discende proprio quella "giustizia climatica"[10] a cui ci si sta qui riferendo. Diritto al clima che, in questo caso, è portato avanti dall'attivismo sociale dei gruppi di pressione ecologisti: si pensi, per tutti, all'attivismo di Greta Thunberg. Attivismo sociale che riesce a dare avvio all'emersione *Bottom up* dei diritti, cioè a quell'emersione dal basso di istanze sociali che, ritenute legittime, promanano dai cittadini e si presentano al legislatore per essere riconosciute a livello giuridico, come nuovi diritti[11].

Per restare, però sul tema della giustizia climatica, seguendo Carducci, si deve prendere atto che: «Le formule "giustizia ambientale", "giustizia climatica" e "giustizia ecologica" identificano un campo semantico talmente variegato e multiforme, da essere utilizzato da giuristi e scienziati sociali per definizioni tutt'altro che univoche»[12]. Riguardo alla definizione di "giustizia climatica", infatti, si ha che «Il formante dottrinale definisce la "giustizia" osservando e comparando il formante "giurisprudenziale", ma molto spesso ignorando le differenze reali tra "ambiente", "clima" ed "ecologia" (così sovrapponendo fenomeni naturali, come il clima, a definizioni convenzionali, come quella di "ambiente", a figurazioni intellettuali, come quella di

[8] Articolo che è stato aggiunto nel 1994 ed è titolato *Protezione dei fondamenti naturali della vita*.
[9] *Ex plurimis*, cfr. A. PISANÒ, *Il diritto al clima. Il ruolo dei diritti nei contenziosi climatici europei*, Napoli, ESI, 2022.
[10] A cui si è riferito, esplicitamente, ad esempio, il Comitato Economico e Sociale Europeo, con un Parere (2018/C 081/04), inerente proprio il tema della giustizia climatica.
[11] Per un primo inquadramento si veda F. VIOLA - I. TRUJILLO, *What Human Rights Are Not (Or Not Only). A Negative Path to Human Rights Practice*, New York, Nova Science, 2014.
[12] M. CARDUCCI, *La ricerca dei caratteri differenziali della "giustizia climatica"*, op. cit., p. 1345.

"ecologia"), per poi trascurare anche gli elementi determinanti e distintivi del formante "normativo", riferibile ora all'"ambiente", ora al "clima" ora alla "ecologia". Contestualmente, filosofie ed etiche ambientali discutono delle questioni di "giustizia", senza considerare gli elementi determinanti dei diversi sistemi normativi, al cui interno»[13]. Un tema giuridico nuovo, quindi, che soffre della mancanza di un'adeguata comprensione delle caratteristiche dell'oggetto di cui si chiede la normazione.

Ma al di là della tecnicità che tale normazione sembrerebbe richiedere (facendo appello, quindi, alle conoscenze della meteorologia, della geologia, della biologia, ecc.) quello che qui si vuole evidenziare, concludendo queste sintetiche riflessioni, è che con riferimento all'emersione del nuovo diritto umano "al clima" e con l'esigenza sentita di una "giustizia climatica" si vuole evitare di giungere a quello che già alcuni decenni addietro Cotta, con una primigenitura, paventava come un rischio concreto. Egli diceva, infatti, che la natura, davanti alla volontà dell'uomo di dominarla, si ribella, non contrastando questa volontà di potenza (questa *hybris faustiana*), ma arrendendosi ad essa ed, in ultimo, morendo[14]. E le azioni climalteranti antropiche, spesso, derivano proprio da questa volontà sfrenata dell'uomo di dominare la natura.

D'altra parte, anche nella *Genesi* vi è un richiamo all'uomo perché sia *custode* e non *padrone* del creato[15]. Concezione ripresa nella Lettera Enciclica *Laudato sí* di Papa Francesco[16]. Concezione presente, parimenti, in tante posizioni teoriche di matrice laica e non religiosa, che però, sposano posizioni non-antropocentriche, diminuendo, a parere di chi scrive, però, in tal modo (a differenza della posizione sostenuta nella Genesi) quella superiorità morale dell'uomo (che trova fondamento nella sua dignità) che lo distingue dagli altri esseri che vivono sulla Terra.

Bibliografia:

CARDUCCI M., *La ricerca dei caratteri differenziali della "giustizia climatica",* in S*aggi – Dpce online*, 2020/2.

COTTA S. - CAGLIOTI V. - QUADRI R. (a cura di), *L'uomo e l'ambiente. (Atti completi del XXII Convegno nazionale di studio, Roma, 6-7 dicembre 1971)*, Milano, Giuffrè, 1972.

JONAS H., *Il principio di responsabilità. Un'etica per la civiltà tecnologica* (1979), trad. it. a cura di P. Rinaudo, a cura di Portinaro P. P., Torino, Einaudi, 1990.

MENGA F. G., *Etica intergenerazionale*, Brescia, Morcelliana, 2021.

PISANÒ A., *Il diritto al clima. Il ruolo dei diritti nei contenziosi climatici europei*, Napoli, ESI, 2022.

PONTARA G., *Etica e generazioni future*, Roma-Bari, Laterza, 1995.

RAWLS J., *Una teoria della* giustizia (1971), trad. it. di U. Santini, a cura di S. Maffettone, Milano, Feltrinelli, 1983.

UNESCO, *Dichiarazione sulle responsabilità delle generazioni presenti verso le generazioni future*,12 novembre 1997.

VIOLA F. - TRUJILLO I., *What Human Rights Are Not (Or Not Only). A Negative Path to Human Rights Practice*, New York, Nova Science, 2014.

[13] *Idem*, pp. 1345-1346.

[14] Illuminante al riguardo la relazione introduttiva di S. COTTA al Convegno UGCI del 1971, i cui atti si leggono in S. COTTA - V. CAGLIOTI - R. QUADRI (a cura di), *L'uomo e l'ambiente. (Atti completi del XXII Convegno nazionale di studio, Roma, 6-7 dicembre 1971)*, Milano, Giuffrè, 1972.

[15] Cfr. GENESI, I, 28 e II, 15.

[16] FRANCESCO, Lettera enciclica *Laudato sí. Sulla cura della casa comune*, 24 maggio 2015.

ISBN: 978-2-931089-30-9

L'élite intellettuale, culturale ed artistica nel processo di democratizzazione dell'Albania del XXI secolo

("The intellectual, cultural and artistic elite in the democratization process of Albania in the 21st century")

Enida BOZHEKU*
Ph.D., A.L. - Researcher, Tirana - Albania

Abstract: In the long process of democratization that Albania is facing, the Albanian intellectuals, above all, in the last decade have been experiencing their role in Albanian society with great suffering. Albania, a controversial country with a socio-political-cultural and legal history of considerable nuances where, in its evolutionary path, the attention on the role of intellectuals could not fail to stop. The role played by these researchers, professors, men and women of thought is viscerally linked with the formation of ideas, cultural and thought opposition to political autocracy and the hegemony of power. Intellectuals are those who, with their own social role, are an integral part of the socio-political-cultural dynamics of the country. In Albanian culture it is noted how this important elite of the creation of thought is increasingly marginalized, confined to narrow spaces as its thoughts often contrasts with the will expressed by the political elite, and in other guises from the economic one as a basis for support of the former.
The Albanian political elite but also the economic one is characterized by a strong autocratic ascendancy, not always equipped with high levels of education and often prone to censorship of the manifestation of free thought and/or its manipulation through various channels. typical of power imposition.
It seems that the role of the intellectual in Albania is weak, prone to self-censorship and often frightened for fear of personal repercussions and / or extended to their relatives in the event that with their thinking and public manifestation of the same, affected public opinion. And in this perspective, Albanian intellectuals, often and willingly, have accepted to have a role of mere rhetoric, within certain canons that do not directly affect power rather than taking concrete actions and assuming responsibility.
Julien Benda's interpretation of intellectualism is that: Intellectuals are those whose activity, by nature, does not follow practical purposes, but who, seeking satisfaction in the exercise of art or science or metaphysical speculation, in short, in the possession of a non-temporal good, say in some way: "My kingdom is not of this world". It seems clear that for a country with a democracy tending towards autocracy rather than democratic consolidation, in order for knowledge to evolve, the country to improve, and the intellectual elite to contribute, there is a need for a climate of freedom of criticism that belongs to academics, university professors, professionals, artists, so that heterogeneous debate fronts can be opened, challenging the hegemony of power, which very often and willingly hides behind conceptual paradigms such as "representative democracy" .
I have been voted, I can, I decide the fate of all.

Keywords: Intellectuals, hybrid democracy, free press, weakness, culture

1. Il ruolo degli intellettuali albanesi nella società democratica

Nell'intraprendere questo lavoro, l'idea analitica si è fermata sul caso dello Stato dell'Albania.

* Corresponding Author: enida.bozheku@qiriazi.edu.al

Un paese controverso con una storia socio-politico-culturale e giuridica di notevoli sfumature dove nel suo percorso evolutivo, non si poteva non fermare l'attenzione sul ruolo degli intellettuali nella formazione delle idee, nell'opposizione culturale e di pensiero che questi soggetti studiosi, accademici, professorato, uomini e donne di pensiero pongono dinanzi all'egemonia del potere e delle dinamiche socio-politoco-culturali che affligono questo paese.

Partendo dagli intellettuali, nel lungo processo di democratizzazione che l'Albania sta affrontando, gli intellettuali albanesi nell'ultimo deccennio stando vivendo con sofferenza. il proprio ruolo nella societa'. Essi sono sempre più emarginati, confinati in spazi angusti in quanto il loro pensiero spesso contrasta con la volontà espressa dall'élite politica, in particolare, e quella economica come base di sostegno della prima. In tale ottica, l'élite politica albanese ma anche quella economica è caratterizzata da un forte ascendete autocratico, non sempre dotata di alti livelli di istruzione e molte volte incline alla censura della manifestazione del libero pensiero e/o della manipolazione dello stesso attraverso vari canali di imposizione tipica del potere[1].

Da questo quadro sembra che il ruolo dell'intellettuale in Albania sia debole, incline all'autocensura e spesso intimorito per paura di ripercussioni personali e/o estese a propri famigliari nel caso in cui con il loro pensiero e manifestazione pubblica dello stesso, incidessero sull'opinione pubblica. Cosi', gli intellettuali albanesi, spesso e volentieri hanno accettato di avere un ruolo di mera retorica, entro certi canoni che non intacchino direttamente il potere piuttosto che intraprendere azioni concrete e di assunzione di responsabilità.

Propria sulla responsabilità dell'élite intellettuale, la sociologa Simone Weil[2] scriverà:

L'iniziativa e la responsabilità, il sentimento di essere utile e perfino indispensabile, sono bisogni dell'anima umana. Ma se l'anima umana viene manipolata, travisata e sottoposta a condizionamenti economici, vi può essere, azione e assunzione delle proprie responsabilità dinanzi al futuro, contrapponendo se stessi al potere?

Ad oggi sembra che tale domanda sia di fronte ad un bivio!

Molti intellettuali preferiscono rimanere chiusi nelle loro posizioni di forza, nella comodità dei loro studi, e nell'agiatezza procurata dal potere al quale servono senza lasciare spazio alla loro missione di "*influencer*" per risvegliare la coscienza e educare con il loro pensiero le masse. Il ruolo che gli intellettuali albanesi dovrebbero svolgere, ma che in realtà solo in pochi sono propensi a farlo, dovrebbe essere dotato di senso critico, gli intellettuali albanesi dovrebbero essere liberi da ogni vincolo, da ogni censura relativa alla libera manifestazione del pensiero e della libertà di espressione, per poter, in questo modo contribuire allo sviluppo del paese. Realtà questa che in Albania, nella maggiornaza dei casi trova molta ostilità e persino censure studiate ad arte, come la censura nei media e/o la censura imposta per altre vie, quali il timore concreto di perdere il posto di lavoro proprio e/o dei propri parenti più stretti. Partendo da questo presupposto sembra chiaro che per un paese con una democrazia tendente all'autocrazia piuttosto che al consolidamento democratico, affinché la conoscenza evolvi, il paese migliori, e l'élite intellettuale dia il proprio contributo c'è bisogno di un clima di libertà della critica[3], che sia propria dgli accademici, professori universitari, professionisti, artisti, di modo che si possano aprire fronti di dibattito eterogenei, sfidando l'egemonia del potere, che molto spesso e volentieri, si nasconde dietro paradigmi concettuali quali "democrazia rappresentativa", ovvero sono stato votato, io potere, decido le sorti di tutti.

Come affermava Mill, nel suo *Saggio sulla Libertà*[4]:

[1] BIRN - Rete Balcanica dei Giornalisti Investigativi, operante in Albania, come organizzazione indipendente - http://www.osfa.al/tematika/media/media-investigative, accesso il 6.09.2022

[2] Weil S., *Contro i partiti. Solo ciò che è giusto è legittimo*. Piano B Ed., Prato, 2017, p. 57

[3] Chul Han B., *Psicopolitica*, Nottetempo, 2016, pp. 15-16

[4] Mill J. S., *Saggio sulla libertà*, Il Saggiatore, Milano, 2014, p. 57

L'utilità di un'opinione è essa stessa una questione d'opinione, altrettanto contestabile, aperta alla discussione, quanto l'opinione stessa.

In tal senso anche la sociologa S. Weil[5], asserisce che:

La libertà d'espressione, illimitata, di qualsiasi opinione, senza nessuna restrizione né riserva, è un bisogno assoluto per l'intelligenza, affinché l'anima non si ammali".

Ad aiutare l'espressione della libertà di pensiero, la Weil chiama a sostegno il ruolo della stampa, la quale non deve censurare l'opinione libera, ma, anzi, deve lasciare sfogo alla diversità di pensiero facendo così, lascerà liberi gli individui a scegliere essi stessi ciò che più si adegua alla loro percezione, cultura e mentalità. Il bisogno di libertà, continua la Weil, così essenziale per l'intelligenza esige una protezione contro la suggestione, la propaganda e l'influenza ossessiva.

Lo Stato, su questa scia, ha l'obbligo di garantire tale libertà senza impedimenti e senza coercizioni tali da imporre la propria forza nel vincolare la libertà d'espressione. Nel caso in cui lo Stato stesso si serve di tale forma di libertà per fini propri soggetti alla sottomissione della popolazione, quello Stato non ha più diritto di cittadinanza democratica ma sfocia nell'autocrazia per raggiungere il suo apice nella manifestazione più cruente della dittatura. E, dunque, l'intelligenza è vinta appena l'espressione dei pensieri è preceduta esplicitamente o implicitamente, dalla parolina "noi".

In tale ottica, la circolazione delle élite formulata da Pareto[6] sembra, nei giorni nostri, diventare una prerogativa indispensabile per far crescere in maniera sana anche le democrazie più fragili, quelle ibride in particolar modo, quale è ad esempio quella albanese. Collegando il discorso della libertà d'espressione e dell'azione propria che dovrebbe essere di coloro che fanno parte dell'élite intellettuale, lo studioso Edward Said nel suo saggio "*Dire la verità. Gli intellettuali ed il potere*" ha colto con grande maestria il dualismo esistente tra intellettuale e potere. Una nozione molto utilizzata nel definire gli intellettuali spetta, però, per antonomasia ad Antonio Gramsci[7], il quale scriverà:

"Tutti gli uomini sono intellettuali, si potrebbe dire […]; ma non tutti gli uomini hanno nella società la funzione di intellettuali".

Nel voler utilizzare il pensiero di Gramsci, ed attualizzarlo ad esempio irrinunciabile all'intellettualismo albanese, lo studioso Said, interpreta con molta arguzia il dualismo tra gli intellettuali tradizionalisti, ovvero gli insegnanti e i funzionari che continuano a svolgere sempre lo stesso ruolo di generazione in generazione e gli intellettuali organici, direttamente collegati con le classi o le imprese che si servono di loro per organizzare interessi, acquisire potere, rafforzare il controllo.

Gramsci, in quest'ottica, ritiene, secondo Said[8], che gli intellettuali organici siano attivamente coinvolti nella società e costantemente impegnati a lottare per cambiare orientamenti ed espandere mercati. Questa tipologia di intellettuali è sempre in movimento, sempre in prima linea. Seppur vero che gli intellettuali debbano essere in prima linea non sempre la loro libertà d'espressione è lasciata a libero arbitrio. Come già inteso sopra, in Albania, seppur in una democrazia caratterizzata da garanzie costituzionalmente erette, in concreto, proprio l'intellettuale non sembra essere destinatario di tali garanzie. Per dirla con Said, i veri intellettuali[9] costituiscono un ordine, ristretto, poiché difendono i principi della verità e della giustizia, che non sono

[5] Weil S., *op. cit.*, p. 71

[6] *I significati del termine "élite"*, in AA.VV., *Le élites politiche*, Laterza, Bari, 1961, pp. 94 – 99, Il primo grande studioso e co-fondatore del concetto di élite, così come viene oggi studiato, fu Vilfredo Pareto, il quale propose di sostituire il termine "classe dominante", elaborato da G. Mosca, con "élite[6]", inteso come sinonimo di aristocrazia, riferibile a soggetti aventi particolari capacità ed attitudini in relazione alle attività ed ai posti in società che detti soggetti "élite", appunto, occupavano nella gerarchia sociale.

[7] Gramsci A., *Gli intellettuali e l'organizzazione della cultura*, Einaudi, Torino, 1955, p. 6

[8] Said E., *Dire la verità. Gli intellettuali ed il potere,* Feltrinelli, Milano, 2014, p. 20

[9] *Ivi*, p. 21

propriamente di questo mondo. E proprio su questa scia che in Albania i pochi intellettuali volti all'azione sono quelli che lottano di più nel libero mercato, in quanto per ragioni di colleganza tra élite politica ed élite economica spesso il loro pensiero viene censurato o sottoposto a coartazioni diverse volte al loro silenzio.

Individuando il ruolo dell'intellettuale, come assioma teorico, l'interpretazione che Julien Benda[10] fa dell'intellettualismo, è lungimirante. Egli scrive:

Sono intellettuali coloro la cui attività, per natura, non segue fini pratici, ma che, cercando la soddisfazione nell'esercizio dell'arte o della scienza o della speculazione metafisica, nel possesso insomma di un bene non temporale, dicono in qualche modo: "*Il mio regno non è di questo mondo*". Il vero intellettuale non è mai tanto sé stesso come quando, sulla spinta di una passione metafisica e dei principi disinteressati della giustizia e della verità, denuncia la corruzione, difende i deboli, sfida il potere inadeguato o tirannico[11].

Collegando il pensiero di Benda a quello di Said, egli continua nell'elencare le caratteristiche tipiche dell'intellettuale, i quali per Said sono soggetti da una forte personalità, individui risoluti, oppositori dello status quo. La figura dell'intellettuale è complessa, egli spesso si trova in contrasto con l'uniformità della massa, non esita a dire la verità al potere, uomo scontroso, facondo e iracondo, dotato di straordinario coraggio, per il quale nessun potere incute soggezione ed è così immenso da non dover esser sottoposto a critiche e inchiodato alle proprie responsabilità. L'intellettuale è un individuo che svolge nella società uno specifico ruolo pubblico che non può essere riduttivamente equiparato a quello di un anonimo professionista, membro competente di una classe che si limita ad occuparsi di propri interessi. Caratteristica dell'intellettuale è il fatto di essere una persona capace di rappresentare, incarnare, articolare un messaggio, un punto di vista, un atteggiamento, una filosofia o una convinzione di fronte a un pubblico e per un pubblico[12]. Non esiste la figura privata dell'intellettuale, poiché nel momento stesso in cui egli mette per iscritto alcune parole per poi pubblicarle è già una figura pubblica; ciò che importa all'intellettuale è quello di provocare, contrastare, a costo di risultare spiacevole.

L'intellettuale è una figura rappresentativa: ossia qualcuno che rappresenta un certo punto di vista dandogli visibilità, che espone le proprie argomentazioni di fronte al suo pubblico con sapiente chiarezza, quali siano gli ostacoli da superare. L'intellettuale non intende arrendersi alla vita domestica, alla monotonia della routine. Fine ultimo dell'intellettuale è quello di promuovere la libertà e la conoscenza dell'uomo, anche se tale suo fine troverà nel suo essere il bivio tra la solitudine e l'allineamento. Per Said[13], l'intellettuale:

Non è né un pacificatore né un artefice di consenso, bensì qualcuno che ha scommesso tutta la sua esistenza sul senso critico, la consapevolezza di non essere disposto ad accettare le formule facili, i modelli prefabbricati, le conferme acquiescenti e compiacenti di ciò che i potenti o i benestanti hanno da dire e di ciò che poi fanno. Lo status dell'intellettuale non è solo quello di opporsi in ogni modo e ad ogni proposito al potere, o criticare sempre e comunque la politica, ma il suo ruolo è quello di pensare, essere sempre vigile nei confronti della realtà, non lasciarsi pilotare da mezze verità o idee ricevute da altri per imposizione, manipolazione o soggezione.

Dunque, la libertà di espressione senza compromessi è il principio baluardo[14] dell'intellettuale laico: rinunciare a difenderlo o consentire che ne siano manomessi i fondamenti significa tradire la propria vocazione. Ed ecco perché, l'intellettuale che dice la verità al potere non è un idealista alla *Pangloss*, ma significa che egli soppesa scrupolosamente le alternative, sceglie quella migliore per rappresentarla con sapienza e là dove si rivela più efficace ne modifica la realtà secondo giustizia. Le caratteristiche formulate da Said sulla figura dell'intellettuale, in

[10] Benda J., *Il tradimento dei chierici*, tr. It. Einaudi, Torino, 1976, p. 95
[11] *Ivi*, p. 100
[12] Said E., *op. cit.,* p. 26
[13] *Ivi*, p. 37
[14] *Ivi*, p. 108

una democrazia piena troverebbero una massima applicabilità ma in realtà di democrazia ibrida, dove la libertà d'espressione esiste sulla carta ma non spicca mai il volo, anche la figura dell'intellettuale viene distorta.

Nell'Albania del XXI secolo, l'intellettuale vero è solo, molte volte emarginato fino al punto da cercare in ogni modo di emigrare. Inoltre, gli intellettuali di questo paese sono sempre più propensi ad autocensurarsi, a cercare in maniera indiretta e/o laconica molte volte a manifestare il proprio pensiero ed apparentemente a conformarsi non per volere ma per imposizione, in quanto sé risulteranno dominanti con le loro idee ed azioni concrete, l'élite politica tenderà subito a censurarli e ad obbligarli a schierarsi con loro e/o a scegliere la via del silenzio o dell'emigrazione.

2. La cultura come baluardo della democrazia

Nel continuare il nostro discorso sul ruolo dell'intellettuale in democrazia, e più nello specifico nelle democrazie ibride, quale quella albanese, non possiamo non soffermarci su una questione socio – antropologica del concetto di cultura. Essa funge da base per poter identificare in seguito anche i processi evolutivi che hanno portato alla creazione di questi sistemi democratici ibridi, i quali di base hanno al loro perno la cultura, come fondante del pensiero e dell'attività socio-politico-economica di un paese.

I primi antropologi – sociologi strutturati, tra i quali ricordiamo i nomi di James Frazer (1854-1941), autore della celebre opera *Il ramo d'oro*, Edward B. Tylor (1832-1917), che tra le altre cose formulò una definizione di cultura ancora oggi riportata in tutti i manuali di antropologia, e lo statunitense Lewis Henry Morgan (1818-1881), furono coloro che diedero forma e statuto di disciplina a pratiche occasionali e non strutturate delle forme di manifestazione della cultura. Il perno centrale attorno a cui ruota tutta l'attività antropologico culturale, con connotazioni socio-politico-economiche è il concetto di *cultura*[15].

Questo termine, nella lingua italiana ma non solo, viene usato sostanzialmente con due accezioni diverse. **La prima è di carattere storico** e indica un sapere appreso attraverso gli studi.

Una «persona di cultura» è qualcuno che ha studiato molto e che traduce questo suo sapere in forme di conoscenza del mondo sconosciute alla maggior parte delle persone normali. In questo caso il contrario di cultura sarebbe «ignoranza» e la «cultura», secondo questo approccio, sarebbe pertanto una qualità riservata a pochi eruditi e non appannaggio della maggior parte della gente.

Nel 1871 Edward Tylor, uno dei padri fondatori dell'antropologia culturale, formulò una definizione di cultura, che ancora oggi viene ripresa da pressoché tutti i manuali di questa disciplina:

"La cultura [...] presa nel suo significato etnografico più ampio, è quell'insieme che include conoscenze, credenze, arte, morale, legge, costume e ogni altra capacità e usanza acquisita dall'uomo come appartenente a una società".

Una definizione che è stata successivamente accusata di essere un pò troppo rigida e statica, ma le cui sintesi e chiarezza fanno sì che regga al trascorrere del tempo.

Due passaggi della frase di Tylor sono particolarmente importanti. Il primo è «acquisita dall'uomo»: con queste parole l'autore sottolinea come la cultura non sia un elemento innato, ma il prodotto di un'educazione prolungata, di una *costruzione* sociale. La cultura è quindi il prodotto di un lungo e articolato processo di costruzione.

Il secondo passaggio è quello finale, quel «come appartenente a una società», che mette in luce come la cultura sia il frutto di *relazioni* tra più individui e non l'esclusiva di una persona

[15] Aime M., *Antropologia*, Egea, Milano, 2016, p. 11

sola. È dal dialogo, dallo scambio, dall'incontro che nasce ogni cultura. Potremmo dire che le culture stanno nelle relazioni, in quello spazio tra le persone che deve essere riempito con forme di comunicazione e di comportamento condivisi.

Le culture sono strumenti che servono agli uomini per *ordinare* a modo loro il mondo che li circonda[16], per ricollocare, secondo i loro parametri, ciò che apparentemente non ha un ordine o meglio non ha un ordine «umano». È attraverso i *modelli culturali*, agglomerati, ordinati di simboli significanti, che l'uomo dà un senso agli avvenimenti che vive. Ogni società opta arbitrariamente per una gamma di regole e di espressioni che finiscono per diventare un patrimonio da cui attingere. Alcune di queste scelte sono determinate da condizioni ecologiche, storiche o economiche, altre sono puramente arbitrarie. Gli esseri umani creano in questo modo una cultura, in quanto membri di un determinato gruppo più o meno ampio. E proprio, la cultura diventa il movimento in sè che porta un popolo a manifestare varie inquietudini, perplessità e manifestazione di forme di disaggio, quando essa non è più ad appannaggio di tutti ma diventa di esclusiva "proprietà" di un'élite ristretta, economicamente potente, politicamente intoccabile e intellettualmente auto-proclamata superiore, in quanto dotata degli strumenti economici per poterla acquisire.

La cultura che viene ostentata come forma di manifestazione del potere, seppur non piena, non completa, raggiunta senza sforzi e/o studi particolari, ma utilizzata attraverso la ricchezza per dimostrare alle masse che se si ha denaro si può acquisire anche la cultura, nelle democrazie ibride diventa un'arena di scontro tra ricchi ed intellettuali, dove i primi attraverso il possesso del denaro, credono che in automatico siano anche in possesso della cultura, e dove gli intellettuali, non avendo denaro ma solo conoscenza, se avidi, si mettono a servizio dei primi, distruggendo, di fatto, l'equilibrio sociale fragile che nelle democrazie ibride e appesa ad un filo.

La cultura diventa "la terra di scontro" e del disprezzo comune a livello psichico tra ricchi e poveri. Dove i primi si autocompiacciono, in quanto corrotte dal denaro, da risultare inconsapevoli di sé stesse – dei "Milionarr[17]", dei milionaridioti ("narr" in tedesco significa "studpido"). E tale accezione fa sì che ai poveri, seppur intellettuali di formazione, rimanga l'inventiva, l'umorismo, la sottigliezza e la creatività.

3. Arte e potere

Collegando il discoro della cultura e del suo rapporto con la democrazia, da una analisi del PIL approvato dal governo albanese da dedicare alla cultura per l'anno 2022[18], è emerso che solo il 1,3% di esso è dedicato al finanziamento della cultura in generale e dell'arte di ogni genere essosi manifesti. In tal modo si dimostra così, che più la popolazione si lascia nell'ignoranza più facile sarà dominarla attraverso altre forme, tra cui quella principale, l'utilizzo della propaganda sfruttando i canali mediatici, sottoposti al controllo ambivalente della politica e degli oligarchi economico - finanziari[19]. Meno investimenti sulla cultura più alto il livello di corruzione, più basso il livello di responsabilizzazione e della conoscenza dei propri diritti e doveri.

In Albania, il fenomeno della mancanza di cultura, in senso ampio, del livello basso di istruzione seppur molti in possesso di una Laurea, soprattutto in scienze umanistiche, e della mancata promozione dell'arte come forma di educazione, ha fatto sì che il paese nonostante sia in un regime di democrazia ibrida, ma pur sempre democrazia da un punto di vista formale – istituzionale, sia "*dormiente*" per quanto riguarda il senso critico, le manifestazioni di piazza, la promozione dei valori intellettuali ed il ribellismo creativo in grado di smuovere le masse.

[16] Aime M., *op. cit*., p. 12
[17] Deneault A., *Mediocrazi*a, Neri Pozza, Vicenza, 2017, p. 184
[18] https://financa.gov.al/wp-content/uploads/2021/12/Buxheti-per-Qytetaret-2022.pdf, accesso il 10.09.2022
[19] Chomsky N., *Media e potere*, Bepress, Lecce, 2014, p. 15

Nonostante molti sforzi fatti dalla società civile, o almeno quel gruppo appartenente a tale categoria che non serve il potere di turno per ottenere fondi e finanziamenti, gli unici ancora apparentemente liberi, sembrano essere gli artisti e pochi intellettuali rimasti, che hanno accettato le conseguenze e le ripercussioni, soprattutto economiche che il potere esercita su di loro, lasciandoli emarginati e non involvendoli nella vita attiva del paese. Gli artisti, in tutti i modi, fuori dal paese, stanno cercando di trovare sbocchi per promuovere[20] la loro arte rappresentativa della vera faccia dell'Albania, quella povera, usurpata dai conflitti per la proprietà rimasti irrisolti oramai da più di 32 anni dalla caduta del regime del dittatore Enver Hoxha, della corruzione senza pari, denunciando con forme di arte visiva, musicale, interpretazioni teatrali, pitture, sculture il disaggio del paese.

In questo senso gli artisti, riferendoci al pensiero di Said[21], hanno raggiunto la consapevolezza di essere persone la cui funzione non è solo quella di produrre arte ma è quella di sollevare pubblicamente questioni provocatorie, di sfidare le ortodossie, di non lasciarsi cooptare da governi o imprese, di trovare la loro ragion d'essere nel fatto di rappresentare tutte le persone e le istanze che di solito sono dimenticate o censurate. Loro insieme agli intellettuali devono alzare alta la voce contro ogni genere di gregarismo[22] – e al diavolo il prezzo che pagheranno anche di persona.

Ecco perché è fondamentale per costruire una democrazia sana, eretta su principi universalmente riconosciuti, garantista delle libertà e dei limiti di ciascuno, unirsi, condividere uno stesso obiettivo, rappresentarlo e renderlo attuativo in funzione del bene comune, congiungerlo con le aspirazioni del popolo come un'idea unitaria da perseguire e portare a termine.

Come scriveva, Joyce, attraverso il suo personaggio, Dedalus[23]:

"Pensare è un modo per esprimere il mondo" e se il mondo viene rappresentato dall'arte, come forma di contestazione, rappresentazione del disaggio e della povertà, dei conflitti sociali e della decadenza morale, istituzionale, politica ed economica, allora l'arte si trasforma nella via "della salvezza". In questo senso, Mills[24], identifica nell'arte e nei pensatori, il ruolo che sia l'artista che l'intellettuale hanno nella società, ove scrive:

"L'Artista e l'Intellettuale indipendenti sono tra le poche personalità rimaste in grado di opporsi e di combattere la normalizzazione, e quindi la morte delle cose che vivono di vita autentica".

Una percezione vigile oggi implica la capacità di smascherare continuamente e di infrangere gli stereotipi del giudizio e dell'intelligenza, di cui le odierne comunicazioni ci sommergono. Questi mondi arte – massa e pensiero – massa sono sempre più conformi alle esigenze della politica. Per questa ragione la solidarietà e l'impegno intellettuale hanno il loro fulcro nella politica. Il pensatore che non assuma come riferimento il valore della verità nella lotta politica non può affrontare responsabilmente l'esperienza del vivere nella sua interezza.

L'Artista di oggi, in un'era in cui tutto e commercializzabile, acquistabile dal potere ed usato da quest'ultimo a proprio fine e vantaggio, si trova sempre più sottoposto a restrizioni, se vuole vivere. In questo senso, Lipovetsky[25] e Serroy parlano di "capitalismo d'artista", scrivendo che:

---

[20] http://www.imagomundiart.com/exhibitions/join-dots-unire-le-distanze, http://www.tiranatimes.com/?p=137367 A tale scopo molti sono gli sponsor europei, i filantropi americani[20] che stanno investendo, privatamente, sugli artisti, quelli giovani in grado di smuovere le coscienze delle persone e fargli reagire contro ogni forma di potere che usurpa, travisa e manipola la realtà per mantenere le masse sotto un "sonno perenne" e/o lasciarli nell'indifferenza più assoluta.

[21] Said E., *op. cit.,* p. 26

[22] *Ivi*, p. 57

[23] Personaggio del libro "*Ritratto dell'artista da giovane*" di J. Joyce

[24] Wright Mills C., *Power, Politics and People*: *The Collected Essays of C. Wright Mills*, *a cura di* Irving Louis Horowitz, Ballantine, New York, 1963, p. 299

[25] Lipovetsky G. – J. Serroy, *L'esthetisation du monde*, **Vivre à l'âge du capitalisme artiste**, Paris, Gallimard, coll. « Hors série Connaissance », 2013, p. 108

"Più l'arte s'infiltra nel quotidiano e nell'economia, più perde valore intellettuale; più la dimensione estetica si generalizza, più essa appare come una semplice attività della vita, un accessorio che non possiede altra finalità oltre quella di animare, decorare, rendere sensuale la vita ordinaria". In quest'ottica, adattandola allo scenario albanese, sembra che proprio nel lasciare gli artisti senza sbocchi all'interno del paese dove possano manifestare la propria arte, la mercificazione della stessa attraverso i canali di compravendita formata dai gruppi di élite politica ed economica, capitalizza l'arte, quella poca che si produce all'interno del paese, assoggettandola, poi, al volere dei potenti. In tal modo si fa sì che, gli artisti quelli irriverenti, audaci, intellettualmente potenti vengano costretti ad emigrare e portare nella loro valigia dei sogni il dissenso, l'ammarezza e la ribellione che il potere gli induce a generare con disprezzo e forza creativa.

Conclusioni

Il processo di democratizzazione non è mai semplice, soprattutto in realtà in cui il legame col passato è forte e tramandato di generazione in generazione, di guisa che anche il processo di *circolazione delle élite* diventa una sfida quotidiana e piena di pericoli devianti di varia natura e specie. Per poter costruire una democrazia sana, salda ai principi democratici ed ai valori universalmente riconosciuti, il ruolo che la cultura in sé deve assumere è di vitale importanza.

In democrazie ibride, qual'e' quella albanese, propense alla egemonizzazione del potere in capo ad un unico soggetto, la creazione di élite forti che influenzano sia direttamente che indirettamente le sorti di un paese ed il suo sviluppo sociale, trova difficoltà ed ostacoli a volte insormontabili. Ecco che da qui nasce l'esigenza di formare, istruire, adoperarsi per rafforzare le potenzialità individuali di ciascuno, mantenere l'integrità della cultura, rispettare le identità delle esperienze locali, lasciando libero spazio all'integrazione creativa, al senso comune del vivere sociale ed in armonia, per un futuro migliore.

In questo senso, trova eco, l'espressione utilizzata da Caligiuri[26]:

"Più la politica diventa tecnica, più la competenza democratica regredisce".

Tale deduzione sembra essere perfetta per circoscrivere la nuova forma di democratizzazione presente in Albania, dove più l'élite politica tende a controllare il sistema attraverso meccanismi tecnici, tra cui la propaganda sembra essere quella più produttiva, più la democrazia e la sua vena di libertà e critica si riduce ad un guscio vuoto. La democrazia eretta sulla tolleranza e la solidarietà, nei paesi quale l'Albania, trova difficoltà a poter manifestare la sua potenza, visto che le istituzioni democratiche nella gestione concreta, spesso indirizza questi valori in modo non conforme ai principi democratici.

In tal senso, il ruolo degli intellettuali ed artisti sembra essere fondamentale per mantenere l'equilibrio sociale ed il livello di "guardia" alto, in quanto essi rappresentano una categoria ampia e per molti aspetti indefinibile che, in teoria, esprime tre caratteristiche essenziali: la creatività nel produrre idee che consentano di comprendere le tumultuose trasformazioni sociali; la conoscenza profonda dei meccanismi mediatici; la capacità di essere opinion leader nella comunità. Una nuova dimensione della democrazia del XXI secolo non è solo una democrazia della deliberazione pubblica e della rappresentanza, ma deve essere una democrazia della comunità sociale e civile che integri le diversità e permetta a ogni persona di conferire un senso alla propria esistenza.

[26] Cagliari M., *op. cit*., p. 56 in S. Weil *op.cit.*

Bibliografia

AA.VV., *Le élites politiche*, id., *I significati del termine "élite"*, Laterza, Bari, 1961

Aime M., *Antropologia*, Egea, Milano, 2016

Benda J., *Il tradimento dei chierici*, tr. It. Einaudi, Torino, 1976

Chomsky N., *Media e potere*, Bepress, Lecce, 2014

Chul Han B., *Psicopolitica*, Nottetempo, 2016

Mill J. S., *Saggio sulla libertà*, Il Saggiatore, Milano, 2014

Mills Wright C., *Power, Politics and People*: *The Collected Essays of C. Wright Mills*, a cura di Irving Louis Horowitz, Ballantine, New York, 1963

Weil S., *Contro i partiti. Solo ciò che è giusto è legittimo*. Piano B Ed., Prato, 2017

Deneault A., *Mediocrazi*a, Neri Pozza, Vicenza, 2017

Lipovetsky G. –Serroy J., *L'esthetisation du monde*, *Vivre à l'âge du capitalisme artiste*, Paris, Gallimard, coll. « Hors série Connaissance », 2013

Gramsci A., *Gli intellettuali e l'organizzazione della cultura*, Einaudi, Torino, 1955

Sitigrafia

www.financa.gov.al
www.tiranatimes.com
www.osfa.al

ISBN: 978-2-931089-30-9

The Principle of Non-Refoulement Under International Human Rights Law

Maurizio CARDANOBILE*
IARC – USC International Academic Research Center - Italy

Paola DE SANTIS
IARC – USC International Academic Research Center - Italy

Abstract: The socio-political reasons that push people to flee their country involve ethnic, religious, racial, political and cultural persecutions. War or the threat of conflict or oppression by the state are also determining factors for migration. On the other hand, their status influences their destination, as they encounter countries with a more liberal approach to hospitality than others. These migrants are usually welcomed in the nearest country.
The principle of non-refoulement, literally translated, of non-refoulement, represents a cardinal principle of the right of asylum and international refugee law.
This principle is embodied in the right, recognized to refugee status, not to be conducted in territories where one's individual safety and fundamental freedoms could be exposed to serious danger.
The principle of non-refoulement was officially introduced in 1951 with the United Nations Convention relating to the Status of Refugees.
This Convention had the merit of having defined, or rather, attempted to arrive at an all-encompassing notion of refugee, also sanctioning its rights as well as the obligations imposed on national states.

Keywords: International Relations; National Security; International Political Economy;

JEL Classification F52 International Relations, National Security, and International Political Economy

Summary: *I. The principle of non-refoulement, regulatory sources; II. The Case; III. Conclusion.*

I. The principle of non-refoulement, regulatory sources

The principle of non-refoulement is a cardinal principle of asylum and international refugee law.

This principle is embodied in the right, granted refugee status, not to be taken to territories where one's individual safety and fundamental freedoms could be seriously endangered.

The principle of non-refoulement was officially recognised in 1951 with the United Nations Convention relating to the Status of Refugees [1].

This Convention has had the merit of defining, or rather, attempting to arrive at an all-encompassing notion of refugee, enshrining, moreover, the relative rights as well as the obligations incumbent on national states.

* Corresponding Author: mauriziocardanobile@hotmail.com

[1] La Convenzione di Ginevra del 1951, anche conosciuta, appunto, come Convenzione relativa allo status dei rifugiati, rappresenta, dal punto di vista giuridico, un trattato internazionale multilaterale delle Nazioni Unite approvato nella Conferenza di Ginevra del 28 luglio 1951.

Thus, according to Article 1 of the Convention in question, refugee *<<is a person who is outside his or her country of nationality and has a well-founded fear of being persecuted for reasons of race, religion, nationality or membership of a particular social or political group should he or she return there>>.*

Instead, the principle under discussion, from a mere systematic point of view, is expressly enshrined in Article 33 of the 1951 Geneva Convention, as well as indirectly provided for by the European Convention on Human Rights [2].

As mentioned above, the principle of non-refoulement is covered, in a direct manner, by the Geneva Convention and precisely in Article 33, under the heading, *"Prohibition of Expulsion and Refoulement to the Border", which provides that: <<No Contracting State shall expel or return a refugee in any manner whatsoever to the frontiers of territories where his life or freedom would be threatened on account of his race, religion, nationality, membership of a social group or political opinion. This provision may not, however, be invoked by a refugee unless he or she is regarded as a danger to the security of the country in which he or she resides or constitutes, by reason of a final conviction for a particularly serious crime or offence, a threat to the community of that country>>.*

According to this article, the principle of non-refoulement translates into the obligation of states not to transfer, directly or indirectly, a refugee or asylum seeker to a place where his or her life or freedom would be threatened on account of race, religion, nationality, membership of a particular social group or political opinion.

Thus, the principle expressed operates not only with regard to those who benefit from refugee status, but also with regard to those who might acquire such status, thus offering advance protection.

As proof of this assumption, it is provided that states, before being able to adopt any measure concerning expulsion or refoulement, must ascertain that the individuals to be expelled or refused entry do not run the risk of being subjected to prohibited treatment in accordance with international conventions.

It should also be recalled that the prohibition of non-refoulement is now considered a principle of customary international law.

In addition, the United Nations High Commissioner for Refugees itself has expressed itself on the recognition of the principle in question, stating that the principle, as contained in Article 33 of the 1951 Convention, complements the framework of human rights, and is suitable for meeting the requirements of customary practice.

To conclude these considerations, it is worth reiterating that international jurisprudence has noted a voluminous examination of migratory crime1 conditioned by the current emergency and the complicated coordination between European forces for the management of the relative flows, a circumstance dictated by the absence of an analytical discipline on the division of competences of Member States on the subject of the reception of migrants [3].

In addition to the framework of guarantees outlined above, it is necessary to recall certain EU provisions, alluding to Directives 2003/84/CE and 2005/85/CE, which provided a broader notion of refugee status than the one set out in the 1951 Geneva Convention.

---

[2] Protocollo n.4 della Convenzione per la salvaguardia dei Diritti dell'Uomo e della Libertà fondamentali, che riconosce ulteriori diritti e libertà fondamentali rispetto a quelli già previsti e garantiti dalla Convenzione medesima, nonché, dal primo Protocollo addizionale alla Convenzione, emendato dal protocollo n. 11. (Protocollo addizionale n.4) CEDU.

[3] Affaire Drozd et Janousek c. France et Espagne, requête n. 12747/87, sent. del 26 giugno 1992; Affaire Loizidou c. Turquie, requête n. 15318/89, sent. del 23 marzo 1995; Hussun e altri c. Italia, ricorsi n. 10171/05, 10601/05, 11593/05 e 17165/05, sent. del 19 gennaio 2010.; Hirsi Jamaa et al. c. Italia, sent. 23.2.2012, par. 113; V. Chahal c. Regno Unito, sent. 15.11.1996; Soering c. Regno Unito, sent. del 7 luglio 1989; P. c. Belgio, 1963; Saadi c. Italia, sent. 28 febbraio 2008.

Moreover, it must be added that the European Charter of Fundamental Rights, under Article 19(2), redefined the notion of refugee, albeit loosely, in the wake of the Geneva Convention, replacing the phrase, 'serious risk' with 'well-founded fear'.

Lastly, it should be noted that the legal-individual status of the refugee condition is enshrined in the constitutional text and precisely in the combined provisions of Articles 10, 13 and 28 of the Constitution.

II. The Case

Before addressing the question submitted to the Supreme Court, it is considered appropriate, for the sake of better understanding, to briefly outline the conventional rules governing the obligation to rescue at sea.

First of all, it must be recalled that it is an obligation functional to the protection of fundamental human rights, from which the all-encompassing scope of the protection represented therein clearly emerges.

In this context, therefore, the following is relevant: the United Nations Convention on the Law of the Sea (UNCLOS) [4], which, in Article 98 (1), provides that, the master of the ship must render assistance *<<to anyone whose life is found at sea in danger as quickly as possible>>*, within the limits of the reasonableness of the intervention; in the second paragraph, on the other hand, the provision states that each coastal state is obliged to *<<to promote the establishment, activation and maintenance of an adequate and effective search and rescue service relating to safety at sea and, where circumstances require, to cooperate to this end through regional agreements with neighbouring states>>*.

What is stated in the UNCLOS Convention is an explication of two international agreements, still in force today, drawn up at the time by the IMO [5]; reference is made to the International Convention for the Safety of Life at Sea [6] (SOLAS) and the International Convention on Maritime Search and Rescue[7] (SAR).

With regard to the SOLAS Convention, Chapter V, Reg. 33, of the Annex, provides that the master of a ship who has received information that there are persons in distress at sea and that his or her ship is in a position to render assistance, is obliged *<<to proceed with all speed to their assistance>>*.

And further, under Chapter V, Reg. 7, of the Annex, provides that, Contracting States shall <<to ensure that the necessary arrangements are made for distress communications and coordination in their area of responsibility and for the rescue of persons in distress at sea along their coasts>>.

Thus, search and rescue activities are analytically governed by the SAR Convention, which is based on the principle of cooperation between states and provides for the allocation of search and rescue areas by agreement between them, and they are also required to draw up operational plans that foresee the various types of emergency and the competences of the centres in charge of them.

[4] La Convenzione UNCLOS (United Nations Convention on the law of the sea) venne aperta alla firma a Montego Bay il 10 dicembre 1982, entrata in vigore il 16 novembre 1994 e ratificata con L. 2 dicembre 1994, n. 689.

[5] IMO (International Maritime Organization), trattasi di un istituto specializzato delle Nazioni Unite, con competenze nello sviluppo di principi e tecniche della navigazione marittima.

[6] La Convenzione SOLAS, (Safety of Life at Sea), venne aperta alla firma a Londra il 1° novembre 1974, entrata in vigore il 25 maggio 1980, ratificata con L. 23 maggio 1980, n. 313

[7] La Convenzione SAR (Search and Rescue), aperta alla firma ad Amburgo il 27 aprile 1979, entrata in vigore il 22 giugno 1985, ratificata con L. 3 aprile 1989, n. 147.

According to the provisions of the above-mentioned Convention, the authorities of a coastal State having jurisdiction over the area of intervention, which have received information from the authority of another State of the presence of persons in danger of death in the SAR sea area under their jurisdiction, must intervene immediately; in fact, according to Chapter II, par. 2.1.10, they must ensure <<... *that assistance is provided to any person in distress at sea... without regard to that person's nationality or status or the circumstances in which he or she was found*>>.

The SAR Convention also offers a definition of rescue, understood as a <<*operation to rescue persons in distress and provide them with the first medical or other care they may need and transport them to a place of safety*>>.

Thus, from this last assumption, it can be inferred that the rescue operation can only be said to be completed when the shipwrecked person has completed the disembarkation procedure, which must take place as soon as possible and, above all, in a 'safe place'.

In view of the foregoing, let us review the case at hand.

The Court of Appeal of Palermo, reforming the sentence passed at first instance, convicted the defendants for certain offences provided for and punished by Articles 336, 337 and 339 of the Criminal Code and by Article 12, paragraphs 2 and 3 bis of Legislative Decree No. 286 of 25 July 1998.

In relation to what emerged during the proceedings at first instance, the defendants, in conspiracy with each other, allegedly used violence and threats against the crew and the captain of the rescue vessel, flying the Italian flag 'Vos Thalassa', in order to force the entire team to perform an act contrary to their official duties.

More specifically, after the rescue of 67 migrants in the SAR area (Libyan zone), the communication to Rome intervened, as per procedure, and the latter gave the directive to head towards the African coast in order to allow the transfer of migrants on a Libyan patrol boat and, learning this, the defendants, at the same time, surrounded and threatened the death of part of the crew.

Such conduct, with obvious connotations and coercive purposes, forced the captain of the rescuing vessel to reverse course towards the point of first aid, and to request the intervention of the Italian authorities.

Then, forced by the situation created, the boat headed towards the Italian coast, in order to receive rescue from the navy ship 'Diciotti' (thus in charge A).

With such conduct, moreover, the defendants are alleged to have carried out acts aimed at illegally procuring the entry into the territory of the State of an undefined number, however higher than five, of clandestine migrants from different nations, 'transhipped', in dependence of the illegal conduct described on the military ship 'Diciotti', which arrived near the coast (thus in charge B).

With regard to what has been represented so far, the trial judge concluded with the acquittal of the defendants, considering that the defence of legitimate defence provided for by Article 52 of the Criminal Code existed, since the defendants had reacted in order not to be sent back to Libya, where, with near certainty, they would have been exposed to the danger of violence and inhuman and degrading treatment.

Against the decision of the Court of Appeal, which, as already reiterated, affirmed their criminal liability for the crimes ascribed to them, the defendants, individually, appealed to the Court of Cassation against the judgment of conviction, putting forward several grounds.

The Supreme Court held that both appeals were well-founded.

According to the Supreme Court's analysis, the grounds of appeal raise <<multiple issues that relate to the right of states to control borders and ensure security in the exercise of their sovereignty, the obligation to combat and punish the smuggling of migrants and trafficking in human beings, human rights standards that require the rescue of those who risk their lives at

sea - including migrants -, the protection of the fundamental rights of every person, and the principle of non-refoulement>>.[8]

In the opinion of the Court of Cassation, <<these are questions that require a reconstruction of the legal framework within which the facts of the case took place, which is necessary in order to verify the "tightness" of the contested sentence not only with regard to the verification of the criminal relevance of the facts contested, but also, from a more strictly procedural point of view, with regard to compliance with the obligation to provide an enhanced statement of reasons to which the Court of Appeal was bound in order to reform the sentence pronounced at the end of the first instance trial>>.

For the purposes of the decision, the Court considers it necessary to refer to the factual reconstruction, carried out by the Court, which led to the acquittal of the defendants.

Leaving aside the analytical reconstruction of the facts on which the acquittal judgment was based, following the reasoning of the same Court, <<for the purposes of the assessment of the facts at trial, not even the memorandum of understanding entered into between Italy and Libya in 2017 would be of decisive importance since Libya, at the time of the commission of the facts, could not in any event be considered a safe place in which to take people; at the time the conduct took place, the defendants "were seeing their right to be taken to a place of safety violated by reason of an order. ...contrary to the Hamburg Convention': there was a situation of concrete and present danger not voluntarily determined that legitimised the defendants' proportionate reaction>>.

On closer inspection, moreover, the nomofilactic judge, in its first analysis, considered that the reform of the acquittal sentence, carried out by the Court of Appeal, required the latter to adopt a reinforced motivation.

In fact, in this regard, the Unified Sections of the Court pointed out <<how the obligation of the reinforced motivation is imposed on the appellate judge every time he deems it necessary to overturn the decision of the court of first instance, whether acquittal or conviction. This principle is by now well established and is an integral part of the living legal system; this obligation does not apply in the case of confirmation of the first instance sentence, because, in this hypothesis, the grounds of the appeal decision are welded with the previous one to the point of forming, almost always, a single argumentative complex>>.

Again with reference to the issue of reinforced motivation, in the Court's opinion, <<the obligation to provide reinforced motivation assumes a different argumentative content depending on whether the appellate court, in reforming the judgment at first instance, convicts or acquits. The issue concerns the relationship between enhanced reasoning and the principle of beyond reasonable doubt. While, in fact, in order to pronounce a conviction in the appeal judgement in the face of an acquittal in which a reasonable doubt has arisen, it is necessary to remove the doubt with reasoning that demonstrates its non-existence, in the case of an acquittal that reforms a previous conviction, it is instead sufficient to argue in the positive, in the sense that it is necessary and sufficient to represent the existence of reasonable doubt. It has been noted how, whereas in the case of a pejorative reform of a judgment of acquittal, the appellate court must first demolish the evidentiary reasoning culminating in the decision of the first judge and then structure its own reasoning that demonstrates, beyond any reasonable doubt, the basis of the opposing thesis, in the case instead of a complete ameliorative reform of a conviction, the appellate court, albeit with an enhanced motivation in the sense indicated, must only destructure the reasoning of the first judge, in the sense of configuring the existence of a reasonable doubt that in itself is destined to dismiss the accusatory perspective received by the first judge>[9]

[8] Cort. Cass. sez. VI del 26 aprile 2022 n. 15869.

[9] Cort. Cass. Sez. II del 20/06/2017, n. 41571, Marchetta.

Thus concluding, in relation to the enhanced statement of reasons, the Court further addresses the issue of the conventional rules governing the present case, and indeed, <<under Chapter V, Reg. 33, of the Annex to the SOLAS Convention, the master of a ship in a position to render assistance, who has received information about the presence of persons in a situation of distress at sea, is obliged "to proceed with all speed to their assistance". At the same time, under Chapter V, Reg. 7 of the Annex, States Parties are obliged 'to ensure that the necessary arrangements are made for distress communications and coordination within their area of responsibility and for the rescue of persons in distress at sea along their coasts'. Search and rescue is governed by the SAR Convention, which is based on the principle of cooperation and provides for the distribution of search and rescue areas by agreement between the states concerned, which are obliged to draw up operational plans covering the various types of emergency and the competences of the centres in charge. Under the SAR Convention, the authorities of a coastal State with jurisdiction over the area of operation under the agreements entered into, which have received information from the authority of another State of the presence of persons in distress in the SAR sea area under their jurisdiction, must take immediate action; under para. 2.1.10 of the Annex, they must ensure "... that assistance is given to any person in distress at sea ... without regard to the nationality or status of that person or to the circumstances in which he was found". According to para 1.3.2 of the Annex to the SAR Convention, a rescue is defined as 'an operation designed to recover persons in distress and to provide them with the first medical or other care they may require and to transport them to a place of safety'.

The expression "safe haven" is also used in para. 3.1.9 of the Annex, where it is provided that the party responsible for the search and rescue area in which the operation takes place "shall exercise primary responsibility for ensuring that coordination and cooperation takes place, so that the assisted survivors are disembarked from the assisting vessel and delivered to a place of safety" and that "disembarkation is effected as soon as reasonably practicable">>.

Thus, from what, peacefully, can be deduced from the literal tenor of the SAR Convention, "the rescue operation can only be said to be concluded when the shipwrecked person has been disembarked, which must take place as soon as reasonably practicable and in a 'place of safety'.

Unfortunately, this last statement is not without its gaps; indeed, both the SOLAS and SAR Conventions do not provide a definition of a 'safe place'.

In this regard, in argument, the Court indicates that, <<The content of the International Maritime Organisation's Maritime Safety Committee (IMO) Guidelines on the Treatment of Persons Rescued at Sea are, however, relevant, even though they cannot be regarded as sources of international law within the meaning of Article 38 of the Statute of the International Court of Justice and are not binding. For these guidelines, a 'place of safety' is to be understood as 'a location where rescue operations are deemed to have ended... where the safety of survivors or their lives are no longer threatened, where basic human needs (such as food, shelter and medical care) can be met. And, furthermore, a place from which transportation of the survivors to the near or final destination can be organised">>.

So much so that <<On a provisional basis, until the shipwrecked persons have been disembarked, the relief vessel may also be considered a place of safety, as provided in paras 6.13 and 6.14 of the Guidelines>> [10].

In the continuation of the argumentation, the Court of Cassation, on the basis of the factual reconstruction made and the legal framework indicated, examines whether the Court of Appeal fulfilled its duty to state reasons and correctly applied the criminal law.

The points of the decision devolved to the cognition of the Court of Appeal concerned: a) the existence, affirmed by the Tribunal, of a fundamental right of the person not to be sent back to an unsafe place; b) the definition of "safe place"; c) the identification of the Authority that

[10] Cort. Cass. Sez. III del 16/01/2020, n. 6626, Rackete.

should have coordinated the rescue actions; d) the issue of the application of the Treaty of Hamburg and of the memorandum signed between Italy and Libya in 2017; e) the existence of a current danger of the injury of a subjective right ".

The statement of the above-mentioned points is followed by a long excursus of argument in support of the thesis according to which, from the judgment under appeal, it emerges how the Court of Appeal did not substantially address and resolve any of the issues and points referred to it, having limited itself to showing doubts and perplexities, normatively unsupported.

III. Conclusion

The Court of Appeal of Palermo in reforming the sentence of the trial judge, condemning the defendants for the crimes ascribed to them, excludes the operation, in the case in point, of the exculpatory offence under Article 52 of the Criminal Code in that, the two defendants, would have voluntarily placed themselves in the situation of danger and, therefore, could not invoke the cause of justification in comment.

What is evident is not so much the errors the Palermo judge himself ran into, but above all the fact that, in the context of a vast mass of imperative norms, causes of justification, duties sanctioned in community and international law, which in practice are interspersed, the offences committed by the shipwrecked persons in order to land at the <<safe place>> or, to avoid repatriation, as in the case under comment, are justified, possibly, by the state of necessity/fulfilment of the duty to assist the shipwrecked persons by allowing them to disembark in a 'safe place', and by the legitimate defence against the person who intended to take the migrants back to a place that was dangerous for their individual safety, as well as, to this must be added the interpreter's difficulties in orienting himself in the normative qualification of the fact in its complexity.

Despite the fact that the appellate court's interpretative effort should be acknowledged, the Court of Cassation points out the contested sentence as flawed, not only in terms of the motivation and the application of the criminal law with regard to both charges, but also with regard to the related issues founding the criminal liability with reference to the charged offences.

Therefore, at the conclusion of the analysis, the Supreme Court orders that the judgment must be set aside without referral because the facts do not exist.

ISBN: 978-2-931089-30-9

Processo penale e processo tributario: la disciplina dei travasi

Aurora PICONE*
Università della Calabria - Italy

Abstract: The criminal and tax trial can be included in different and unethical aspects, which is why one wonders what nature their relationship is. In fact, retracing the historical evolution that has involved the tax process, we have seen how its typical elements have subsequently disappeared, thus changing the whole question of the relationship between trials. In addition, we want to analyze the evidential regime typical of both proceedings, to understand the most divergent aspects.
Consider, for example, the witness evidence typical of the criminal trial but prohibited in the tax trial. Well, how can you imagine reconciling the criminal trial with the tax trial?
On the basis of these critics, the flaws of the administrative action are then reviewed. One wonders what are the specific defects for which the suspension of the trials could be caused. And again which ones are connected. Well, the first are those that exclusively concern the tax assessment action. The second, on the other hand, are those that involve rules or subjects of the criminal trial.
Therefore, in analyzing the most significant aspects of the transfer, passing from history, and therefore from theory, to practice or to the concrete case, there are, with no doubt, gaps and unclear aspects. But it is certainly true the indisputable certainty about the respective autonomy of the two proceedings. The famous double track by virtue of the ne bis in idem

Keywords: Trial; tax; transfers; criminal;

Introduzione

Il processo penale e tributario si caratterizzano per aspetti differenti e antitetici, ragion per cui ci si chiede di che natura sia il loro rapporto. Infatti, ripercorrendo l'evoluzione storica che ha riguardato il processo tributario, si è visto come suoi elementi tipici sono successivamente venuti meno, mutando così l'intera impostazione del rapporto tra procedimenti.
In più, si vuole analizzare il regime probatorio tipico di entrambi i procedimenti per coglierne gli aspetti più divergenti. Si consideri, ad esempio, la prova testimoniale tipica del processo penale ma vietata nel processo tributario. Ebbene, come si può immaginare di conciliare il processo penale con quello tributario?

Sulla base di queste criticità, si passano poi in rassegna i vizi dell'azione amministrativa. Ci si chiede quali siano i vizi propri per i quali si potrebbe determinare la sospensione del procedimento. E ancora quali siano quelli collegati. Ebbene, i primi, sono quelli che attengono esclusivamente all'azione di accertamento tributario. I secondi, invece, sono quelli che coinvolgono regole o soggetti del processo penale.

* Corresponding Author: piconeaurora98@hotmail.it

Pertanto, nell'analizzare gli aspetti più significativi del travaso, passando dalla storia, e quindi dalla teoria, alla pratica ovvero al caso concreto, non c'è dubbio che vi siano aspetti lacunosi e poco chiari. Ma è senz'altro vero che c'è un'indiscutibile certezza sulla rispettiva autonomia dei due procedimenti: il famoso doppio binario in virtù del principio del *ne bis in idem*.

1. L'evoluzione del diritto penale tributario

E dunque, ancor prima di tracciare i passaggi evolutivi che hanno contraddistinto il diritto penale tributario, è necessario capire cosa si intenda affermare attraverso questa definizione. Comunemente, il diritto penale tributario attiene a quella branca del diritto penale che provvede a sanzionare penalmente la violazione di norme fiscali. Esse stesse, infatti, sono ritenute così tanto importanti che la trasgressione delle medesime, necessita non solo di una sanzione di natura amministrativa, ma anche di una sanzione penale.

In particolare, è alla legge 9 dicembre 1928, n. 2834, poi sostituita dalla legge 7 gennaio 1929, n. 4, che si riconduce, almeno convenzionalmente, la nascita del diritto penale tributario, intitolata "norme generali per la repressione delle violazioni delle leggi finanziarie". Difatti, la suddetta legge, introdusse una parte generale che prevedeva tutti quei principi di diritto sostanziale e processuale che potevano applicarsi esclusivamente agli illeciti finanziari e pertanto, finalizzati a razionalizzare l'apparato punitivo tributario, separando così il diritto penale tributario dal resto del diritto penale. Dimostrazione ne fu l'introduzione del principio di alternatività tra l'illecito penale e quello amministrativo, da cui l'impossibilità a punire con sanzioni amministrative fatti che costituissero reato. Ebbene, si trattava di un principio in conformità con la logica di fondo del sistema punitivo tributario dell'epoca, basato su sanzioni a carattere pecuniario in cui la pena detentiva era una misura assolutamente eccezionale. Né tantomeno, si sarebbe potuto considerare ragionevole sanzionare il medesimo illecito tributario con due sanzioni pecuniarie di cui l'una penale, l'altra amministrativa. Inoltre, la L. 4/1929 introdusse il principio di fissità, ossia la possibilità che una modifica delle norme penali tributarie potesse avvenire solo in presenza di una disposizione espressa, nonché quello di ultrattività delle norme penali tributarie con cui si impediva la retroattività delle norme penali più favorevoli.

In ultimo, l'introduzione sul versante processuale della pregiudiziale tributaria, ovvero il principio secondo cui per i reati tributari l'azione penale doveva rimanere sospesa fino a quando non vi sarebbe stato accertamento definitivo dell'Amministrazione finanziaria sia dell'imposta dovuta che dell'eventuale sovraimposta. Di conseguenza, si voleva riservare l'accertamento dell'evasione agli organi specializzati dell'Amministrazione finanziaria, consentendo l'intervento della giurisdizione penale solamente una volta stabilito l'*an* e il *quantum* dell'evasione.

Tuttavia, con l'aggravarsi del fenomeno dell'evasione e con l'interesse a tutelare sempre di più il gettito fiscale, agli inizi degli anni Ottanta, si è avvertita la necessità di riorganizzare il sistema penale tributario, per mezzo del decreto legislativo 10 luglio 1982, n. 429, ancor più noto come "manette agli evasori", convertito dalla legge 7 agosto 1982, n. 516.

Pertanto, il primo obiettivo del legislatore fu quello di eliminare due pilastri di quel particolarismo tributario che si era affermato con la precedente normativa, vale a dire il principio di fissità delle norme penali tributarie e la pregiudiziale tributaria. Invero, proprio quest'ultima era considerata il principale ostacolo alla repressione dell'evasione fiscale in quanto imponeva, laddove ci fosse stata la violazione di una legge finanziaria, che in primis venisse ad essere accertata la trasgressione della legge finanziaria attraverso il sistema processuale amministrativo tributario, e solo successivamente che la causa venisse istruita dinanzi al giudice penale. Così procedendo, però, diventava assai difficoltoso, se non addirittura impossibile, rivolgersi al giudice penale, essendo particolarmente lungo e farraginoso il primo procedimento.

Dunque, essendo la scelta del legislatore quella di sveltire i tempi del contenzioso tributario, si abrogò la pregiudiziale tributaria, consentendo, quindi, di perseguire i reati tributari, a prescindere dalla procedura amministrativa in cui si controverteva sul tributo dovuto. Sulla scorta di tale innovazione, si arrivò al d.lgs. 10 marzo 2000, n.74. il cui obiettivo era creare un sistema in cui i due procedimenti, rispettivamente quello penale e quello tributario, si dovevano percorrere parallelamente ovvero in maniera distinta e separata. Si parla, infatti, operando ciascuno secondo regole proprie ed autonome, di doppio binario.

Questa rispettiva autonomia, tuttavia, trova un suo momento di sintesi nell'applicazione concreta della sanzione penale. Ciò significa che, secondo una logica di tendenziale unicità, la sanzione tributaria dovrebbe arrestarsi fintanto che non si arrivi alla conclusione del procedimento penale, e dunque, all'assoluzione dell'imputato. Di contro, nella prassi, appare consolidato un orientamento opposto, e pertanto divergente rispetto alla normativa appena considerata. Sia il legislatore, sia la giurisprudenza, infatti, con il loro modus operandi, realizzano sempre più occasioni di contatto tra i due procedimenti, tali da consentire una reciproca influenza.

Ed è sulla base di queste considerazioni, che si devono analizzare gli articoli 19, 20 e 21 del sopracitato decreto. Questi stessi, infatti, consentono di rintracciare non solo gli elementi di peculiarità che contraddistinguono il rapporto tra questi due procedimenti, ma anche di sollevare note di criticità in riferimento ai principi cui si incardina l'intero decreto.

2. Gli articoli di riferimento nello studio della disciplina: aspetti fondamentali

In particolare, attraverso il principio di specialità, si tenta di dare soluzione a tutti quei casi in cui uno stesso fatto è apparentemente in grado di integrare tanto gli estremi di una violazione istituente una fattispecie incriminatrice tipicamente penale; quindi, si parla di un'ipotesi di reato, tanto gli estremi di un illecito amministrativo. E quindi, il suddetto principio si può definire come lo strumento idoneo ad individuare la norma incriminatrice applicabile alla fattispecie, tale da evitarsi la violazione del principio del ne bis in idem e dunque, tale da evitare che uno stesso fatto possa essere imputato, allo stesso soggetto, due volte. Va da sé che laddove le due norme esaminassero fatti diversi, non potendosi ravvisare alcun rapporto di specialità, il soggetto agente, realizzando due illeciti differenti, sarà punito col cumulo giuridico.

Allo scopo di intendersi su quanto detto, è quindi opportuno operare una distinzione tra ciò che è il concorso apparente di norme, e ciò che è il concorso di reati. Infatti, il primo prevede che il verificarsi di una sola condotta sia tale da integrare più fattispecie incriminatrici di cui, solo una troverà applicazione. Il secondo, invece, si ha ogniqualvolta con una sola azione o omissione, si violano più leggi penali realizzando così più reati. Di conseguenza, nel concorso di reati le norme si integrano tra loro consentendo l'applicazione in contemporanea delle stesse, nel concorso apparente di norme, invece, una delle due norme va ad escludere l'applicazione dell'altra.

È poi necessario rilevare l'analogia del suddetto principio, rispetto all'articolo 15 del Codice penale in cui si accerta che "quando più leggi penali o più disposizioni della medesima legge penale regolano la stessa materia, la legge o la disposizione di legge speciale deroga alla legge o alla disposizione di legge generale, salvo che sia altrimenti stabilito." Quanto sopracitato, è stato oggetto di una pronuncia da parte della Commissione Provinciale Tributaria, lan. 147 del 2012. In questo caso specifico, la Commissione tributaria respinse un ricorso proposto da un contribuente che, a seguito di una verifica fiscale condotta dalla Guardia di Finanza, era stato destinatario tanto di una sanzione penale tanto di una sanzione amministrativa con l'imputazione di aver emesso fatture per operazioni oggettivamente inesistenti.

Sull'articolo 20, invece, è bene precisare che la norma considera solo l'incidenza che il procedimento penale ha su quello tributario e nella procedura amministrativa di accertamento, specificando che la pendenza di un procedimento penale non può produrre degli effetti, quali ad esempio la sospensione, rispetto allo svolgimento della procedura tributaria e amministrativa di accertamento. Senonché, nulla viene detto sulle altre reciproche interferenze quali, a titolo esemplificativo, le prove, la partecipazione di soggetti, o ancora l'efficacia del giudicato e quindi, l'eventuale prevalenza dell'un procedimento sull'altro. E nonostante i tentativi del passato, volti a colmare le lacune normative presenti, ancora oggi non abbiamo una disciplina chiara e puntuale, che rispecchi pertanto quel principio di legalità tanto caro, non solo al diritto tributario, ma anche al diritto penale.

E dunque, alla luce di quanto premesso, si rende necessario affrontare un primo problema: le ripercussioni che un processo penale pendente, o concluso con sentenza passato in giudicato, quindi irrevocabile, potrebbe determinare sullo sviluppo del processo tributario, qualora esso stesso non possa configurarsi come pregiudiziale rispetto a quello penale. Questo perché, qualora ci fosse un rapporto di pregiudizialità, il processo penale non si potrebbe né instaurare, né proseguire, senza la preminente definizione di quello tributario. Invero, la pregiudizialità tributaria è stata oggetto di abolizione per mezzo dell'art. 12 della legge n. 516 del 1982, pertanto è sempre necessario verificare in quali termini, la pendenza di un processo penale, possa incidere sull'andamento di quello tributario.

È certo che nella precedente normativa, ci si riferisce qui all'articolo 21 della legge 4/1929, non vi era alcun effetto sospensivo del processo tributario: la pregiudiziale tributaria, infatti, obbligava il giudice penale, in forza del rapporto di pregiudizialità, ad attendere l'esito del processo tributario prima di poter emanare una sentenza penale. Quindi, essendo il processo penale ad arrestarsi, si assisteva ad un rovesciamento dei ruoli.

Senonché, col tempo ci si è resi conto che la pregiudiziale tributaria determinava non pochi problemi, sia sul piano processuale che sul piano politico-criminale. Infatti, si assisteva non solo ad una graduale degenerazione del contenzioso tributario a causa dei tempi necessari al giudizio che venivano estremamente dilatati prima che si giungesse a sentenza definitiva, ma anche ad una persistente impunità dei reati fiscali.

Pertanto, apparve necessario abrogare l'art. 21 della l. 4/1929 in forza della legge 516/1982. Invero, l'abolizione del suddetto istituto ha determinato il venir meno dell'effetto sospensivo, sancendo altresì l'autonomia reciproca dei due procedimenti, quindi instaurando il sistema del cosiddetto doppio binario. Senonché, l'asserita autonomia dei rispettivi procedimenti parrebbe violata nella parte in cui il legislatore, sempre con riferimento alla precedente normativa, ossia l'art. 12 della legge 516 del 1982, ha altresì affermato che laddove una sentenza diventasse irrevocabile, quella stessa avrebbe autorità di cosa giudicata nel processo tributario, guardando proprio a quei fatti materiali analizzati e regolati nel processo penale, tali da rappresentare il presupposto logico e consequenziale della pronuncia del processo tributario. Il sistema del doppio binario diventava così un sistema imperfetto. E allora, non si può che rilevare quanto il comportamento del legislatore si è mostrato per lungo tempo ambiguo, giacché da una parte voleva sancire la separazione, e dunque la rispettiva autonomia dei due procedimenti, dall'altra affermava la superiorità del processo penale rispetto al processo tributario, qualora il giudicato penale si fosse formato prima della pronuncia tributaria.

Sul secondo orientamento, e quindi sulla portata del precedente art. 12, sorgevano tuttavia innumerevoli perplessità. Innanzitutto, si poneva un problema in ordine alla mancata previsione di limiti soggettivi: posto che la giurisprudenza costituzionale e la dottrina concordavano nell'attribuire al giudicato penale un'efficacia solo inter-partes, il che significava riconoscere il prodursi di effetti solo verso chi avesse preso parte al processo penale, si poneva il problema di stabilire se e come, tanto l'Amministrazione finanziaria, quanto il contribuente, potessero prendere parte al processo penale.

Nello specifico, serviva fare chiarezza in merito alla possibilità, per l'Amministrazione finanziaria, di costituirsi come parte civile del processo penale. In secondo luogo, si presentava un problema rispetto alla difformità dei rispettivi regimi probatori: nel processo tributario era, ed è, negata la possibilità di introdurre mezzi probatori tipicamente introdotti nel processo penale, si pensi alla testimonianza. Naturalmente, è evidente che propendere per l'una o l'altra tesi implica considerazioni e conseguenze diverse. Se fosse rimasto vigente l'articolo 12 si sarebbe riconosciuta alla sentenza penale l'efficacia di giudicato nel procedimento tributario. In caso contrario, quindi laddove si fosse verificata l'abrogazione del suddetto articolo, come nella realtà poi è accaduto, si sarebbe finiti col negare qualsiasi tipo di effetto della pronuncia penale nel processo tributario, sancendosi pertanto l'autonomia dei rispettivi procedimenti, così come la si conosce oggi.

Considerato quanto finora esposto, e tracciato questo excursus storico grazie al quale si è potuta evidenziare la situazione incerta che ha contraddistinto gli anni Novanta, non può che arrivarsi ad una conclusione, quale appunto l'evoluzione della normativa che ha portato all'articolo 20 del decreto legislativo 10 marzo 2000, n. 74. Non può non essere riconosciuto l'effetto radicale che ha determinato la riforma, avendo essa stessa ridisegnato le varie fattispecie incriminatrici in materia di reati tributari, e soprattutto avendo chiarito, in maniera definitiva, gli aspetti processuali e i rapporti intercorrenti tra sistema penale e amministrativo sanzionatorio.

Ma, sebbene la portata della riforma sia stata grande, da un punto di vista pratico molti problemi rimanevano comunque irrisolti. Sicuramente, alla luce di quanto detto sull'articolo 12, ci si poteva ragionevolmente aspettare un intervento di riforma volto a sviscerare ogni punto di critica sollevato nei precedenti dibattiti. Eppure, l'articolo 20, si è semplicemente soffermato a ribadire la precedente scelta del legislatore del 1982, nella misura in cui veniva confermata l'abolizione della pregiudizialità del processo penale rispetto al processo tributario, affermandosi così l'autonomia del primo rispetto al secondo.

Rimanevano così irrisolti, tutti gli altri problemi: vietare la sospensione del contenzioso tributario in attesa dell'accertamento penale, significava chiarire solo uno dei tanti punti di criticità sollevati dalla dottrina, nonché dalla giurisprudenza.

3. Il regime probatorio.

Nulla, infatti, è stato detto rispetto al regime probatorio, e in particolare se ed entro quali limiti le prove che si sono formate dinanzi al giudice penale possono essere usate dinanzi a quello tributario. È infatti acquisito il dato secondo cui la prova testimoniale, tipica del processo penale, è inammissibile nel procedimento tributario, al pari del giuramento, anch'esso escluso a prescindere dalle varie forme con cui può essere assunto.

In mancanza di una disposizione, si potrebbe pertanto ritenere che è impossibile ammettere nel processo tributario, prove che sono state assunte in un processo penale. Sul punto, sia la dottrina che la giurisprudenza, si trovano orientate verso un senso, quale quello di ammettere che il giudice tributario possa usufruire come fonte del suo libero apprezzamento e convincimento, delle prove raccolte nel processo penale, a condizione però che il giudice tributario valuti con particolare vaglio critico e quindi, si svincoli del tutto dalla valutazione, nonché interpretazione, che delle stesse prove possa aver dato il giudice penale.

Sulle prove, è necessario poi specificare una distinzione che sussiste nel diritto penale: si parla infatti di prove documentali acquisite nel processo, e di prove costituende, formate in sede penale e che, alla luce dell'articolo 116 del codice di procedura penale, non possono essere considerate prove funzionali alla decisione del giudice, laddove non ci fossero ulteriori prove a sostegno di quelle costituende già raccolte, e che pertanto possono essere considerate argomenti di prova. Questa bipartizione scaturisce dal diritto al contraddittorio nella formazione della

prova: il ragionamento parrebbe infatti quello di garantire alle parti la formazione della prova che, laddove sia documentale, è in grado di dare garanzia del contraddittorio grazie al confronto che viene fatto sulla rilevanza, nonché attendibilità e interpretazione dei documenti, laddove invece sia costituenda, non assistendo le parti alla formazione della prova, non riesce a soddisfare quel diritto di difesa. Ciò sta a significare che, l'inutilizzabilità della testimonianza raccolta nel procedimento penale per un contenzioso tributario, non è determinata dall'inammissibilità della prova dichiarativa quanto semmai dall'esigenza di garantire il diritto di difesa e, dunque, il contraddittorio tra le parti nella formazione della prova.

Tuttavia, accanto a questo problema, ciò che pare sia rimasto ugualmente lacunoso è altresì l'aspetto afferente alla questione del giudicato penale. Certamente il decreto legislativo in esame ha risolto il problema dell'articolo 12 della precedente l. 516/1982, avendolo espressamente abrogato, ma è anche certamente vero, come ormai è stato ribadito più volte, che ha lasciato altre lacune.

Ebbene, tra queste, resta da affrontare il problema dell'efficacia di una sentenza penale divenuta irrevocabile, rispetto al giudizio pendente tributario. Venendo meno l'articolo 12, in virtù della suddetta abrogazione, dovrebbero sopperire norme di carattere generale contenute nel codice di procedura penale. Nello specifico il riferimento è all'articolo 654 c.p.p. che disciplina l'efficacia del giudicato penale nei giudizi extra-penali, quindi giudizio civile ed amministrativo diverso da quello di danno. Si dice dovrebbero, proprio perché appare dubbia l'applicabilità del sopracitato articolo. Infatti, l'art. 654 c.p.p. pone una condizione rispetto all'efficacia del giudicato, quale che la legge civile non ponga limiti alla prova che vuole proporre la controparte. Ma poiché per legge civile si intende una legge extra penale, e poiché il diritto processuale tributario pone limitazioni alla prova, ecco che l'enunciato perde credibilità. Se l'efficacia del 654 c.p.p. è direttamente dipendente dalla mancanza di limitazioni alla prova di controparte, al contrario del regime tributario che si basa invece su una forte limitazione dell'ambito probatorio, ne segue inevitabilmente l'inapplicabilità dell'art. 654 c.p.p. nel procedimento tributario tale per cui, il giudicato penale non potrà disporre di alcun tipo di efficacia vincolante. Questo tipo di sillogismo logico che è stato elaborato dalla dottrina, per cui date due premesse si arriva ad una sola conclusione, sembra l'unica opzione possibile. Alla luce di questo quadro normativo così ricostruito, pare si possa affermare con una certa sicurezza, la rispettiva autonomia, e dunque il principio di separazione, tra i due procedimenti.

Tuttavia, un ulteriore punto di riferimento fondamentale per delineare i rapporti tra procedimento penale e tributario lo si trova nell'articolo 21 del d.lgs. 74 del 2000. Due sono i binari sui quali si innesta la disciplina: da un lato il principio di specialità, dall'altro la decorrenza dei termini di prescrizione e decadenza.

Si è detto che non sussistono rapporti di pregiudizialità tra i due procedimenti, né pregiudiziale tributaria al processo penale, né viceversa pregiudiziale penale al processo tributario, ma si è altresì affermato, col principio di specialità di cui sopra, che la norma penale è da considerarsi speciale rispetto a quella tributaria, ossia l'Amministrazione finanziaria può sospendere l'esecuzione delle sanzioni di natura amministrativa che siano state irrogate precedentemente per violazioni divenute oggetto di una notizia di reato.

Quindi, solo al verificarsi della condizione sospensiva, quale appunto il pronunciarsi sul proscioglimento o sull'assoluzione dell'imputato, l'esecuzione potrà essere nuovamente ripresa. Tuttavia, prima di questa previsione ex art. 21, si ammetteva un modus operandi contrapposto. Infatti, l'Amministrazione finanziaria, irrorava le sanzioni ammnistrative, riscuotendo il pagamento da chi risultava autore materiale del fatto di reato, a prescindere dall'accertamento penale di colpevolezza, e dunque, esponendosi al rischio di restituzione della somma riscossa, laddove in esito al procedimento penale non si fosse avuta la condanna del reo. Conseguenza di ciò, è altresì la volontà del legislatore di tutelare gli interessi dello Stato.

Senonché potrebbe porsi un interrogativo, di cui, in realtà, è lo stesso legislatore che da risposta nella relazione al decreto legislativo: qual è la ratio che sottende la scelta del legislatore

di sospendere il procedimento di esecuzione e non, invece, quello di irrogazione della sanzione. L'illecito penale, a differenza dell'illecito amministrativo, si determina al verificarsi di una serie di elementi, si pensi al dolo o ancora al superamento della soglia di punibilità. E dunque, dinanzi ad un'ottima difesa dell'imputato, pur rimanendo realmente commesso il fatto, potrebbero venir meno, all'esito del procedimento penale, gli elementi necessari a poter configurare l'illecito.

Tuttavia, pur essendo chiara la volontà del legislatore, nonché la ratio dell'istituto, si deve valutare ora la portata di quest'ultimo. Per iniziare è bene precisare che l'articolo 21 trova applicazione soltanto laddove il soggetto, quindi contribuente, non abbia raggiunto un accordo di natura transattiva con l'Amministrazione finanziaria, volendo, egli stesso, impugnare davanti la Commissione finanziaria gli atti di natura impositiva. Se così non fosse, la sanzione amministrativa pagata in virtù dell'accordo non si porrebbe in un rapporto di specialità con quella penale, bensì rileverebbe nel procedimento penale stesso quale somma versata per il risarcimento del danno, secondo quanto previsto dall'articolo 13 del decreto legislativo n. 74. Perdipiù, l'articolo 21 trova applicazione empirica solo dopo l'accoglimento della pretesa erariale da parte della Commissione Tributaria Provinciale.

Senonché, volendosi analizzare il regime probatorio, si deve considerare che nel processo tributario, il quale si configura come un processo di parti, il potere dispositivo della prova spetta alle parti stesse. Nel processo penale, invece, vige il principio del libero convincimento del giudice, di conseguenza, il giudice è libero tanto nella ricerca, che nell'acquisizione che nella valutazione delle prove, a prescindere dall'atteggiamento delle parti. Perdipiù, si deve sottolineare che manca sull'ammissibilità delle prove nel processo tributario una regola generale che ne disciplina l'ambito.

Generalmente, si ritiene che le prove raccolte in altri processi, in particolare in sede penale, possano essere ammesse nel processo tributario. Da ciò, deriva una circolazione della prova che, contrariamente ad una opinione largamente diffusa, non si scontra col principio di separazione e autonomia dei rispettivi procedimenti. Infatti, quando si parla di separazione dei procedimenti, non se ne parla in termini assoluti: laddove due giurisdizioni siano separate, può comunque esserci un rapporto di coordinazione.

Tuttavia, la domanda che sorge spontaneo porsi è come sia possibile ammettere una circolazione della prova laddove ci sia un regime probatorio così differenziato tra i due procedimenti. Difatti, se si considerano prove come la Lista Falciani, ovvero un documento redatto e acquisto sulla base di un illecito penale, è evidente come l'atteggiamento sia assolutamente differenziato. In ambito penale, infatti, si escludono gli accertamenti emessi sulla base della Lista Falciani in quanto emessi sulla base di dati illegittimamente acquisiti, e quindi inutilizzabili. Secondo l'orientamento tributario, invece, i dati contenuti nella lista sarebbero utilizzabili. Questo perché l'inutilizzabilità delle prove illegittimamente acquisite, prevista appunto dall'articolo 191 c.p.p., trova applicazione solo nell'ambito dei procedimenti penali, mentre l'utilizzabilità dei documenti in sede tributaria è esclusa ogniqualvolta la relativa acquisizione sia avvenuta in contrasto ai diritti fondamentali di rango costituzionale.

Ebbene, questo orientamento è stato ripreso ed affermato dalla Corte di Cassazione la quale, con le ordinanze n. 8065 e n. 8606 del 28 aprile 2015, ha dichiarato utilizzabili i suddetti dati in quanto giunti in Italia su impulso dell'amministrazione francese, in ottemperanza della direttiva n. 79/799/CE. E ancor più nello specifico, si è pronunciata recentemente, affermando che nell'ambito delle attività di accertamento, nonché nel contenzioso con il contribuente, l'Amministrazione finanziaria può avvalersi di tutti gli elementi che hanno valore indiziario, salvo che non vi sia una legge tributaria che renda quella prova inutilizzabile.

E allora, si può rilevare come sotto il profilo delle prove illegittimamente o illecitamente acquisite vi sia un regime differenziato. Non si può negare, infatti, che le suddette prove non siano direttamente utilizzabili nel processo penale. Di contro, nel processo tributario, sebbene dovrebbe valere un'analoga soluzione, pur in assenza di una esplicita disposizione di inutilizzabilità, si può sostenere che non bisogna tenerne conto nel valutare la fondatezza di un atto

impugnato. Invero, si pensi anche alle intercettazioni telefoniche il cui utilizzo, ex art. 270 c.p.p., è precluso: esse sono ammesse come materiale probatorio che il giudice tributario deve valutare. Tuttavia, è bene fare una precisazione: si tratta di prove indiziarie ai fini della cognizione del giudice tributario anche se, una giurisprudenza più recente, sembra non escludere la possibilità che la ricostruzione dei fatti nel processo tributario possa fondarsi anche solo su questi indizi. Pertanto, sull'ammissibilità delle prove, non vi è dubbio che l'atteggiamento della Corte di Cassazione sia di assoluta apertura. Infatti, è utilizzabile il materiale istruttorio raccolto in ciascun procedimento, tanto come elemento probatorio, tanto quanto fonte di convincimento da parte del giudice che istruisce l'altro procedimento.

E ancora, si considerino le dichiarazioni di terzi raccolte durante le indagini preliminari e le testimonianze rese al giudice penale piuttosto che civile. Infatti, essendo vietata la prova testimoniale, solo ed esclusivamente nel processo tributario secondo quanto stabilito all'art. 7 del D.lgs. 546/1992 il quale stabilisce che, diversamente da quanto accade nel processo penale, in quello tributario determinati mezzi di prova, quali il giuramento e la prova per testimoni, non sono ammessi, ci si chiede se prove del genere formate al di fuori del processo tributario possano essere utilizzate nel medesimo. Sebbene la regola generale sia quella di considerare ammissibile qualsiasi prova che provenga da altri procedimenti, eccetto casi in cui troviamo divieti espressi, con riferimento alla testimonianza, essendo espressamente vietata si pone un limite.

Infatti, il legislatore ha escluso la testimonianza ritenendo che il procedimento amministrativo fiscale sia caratterizzato da un pericolo quale quello per cui nella testimonianza possa nascondersi ciò che altrimenti farebbe emergere il danno del fisco. Giusto per fare un esempio, laddove ci sia un atto scritto da cui risulti l'esistenza di un negozio giuridico, non si consente al contribuente di ricorrere alla testimonianza per dimostrare che il reale negozio giuridico è stato concluso in difformità con quanto si attesti nell'atto scritto, né tantomeno si concede alle Commissioni tributarie la possibilità di acquisire mezzi testimoniali tramite la libera ricerca.

Senonché, le dichiarazioni di terzi rese ad organi dell'Amministrazione finanziaria non costituiscono delle testimonianze in quanto, affinché si possa parlare di testimonianza, è necessario che il teste sia interrogato, con tutte le garanzie contemplate dalla legge e deponga davanti al giudice. Invero, dal momento che non sono annoverate tra le prove tipiche, ossia quelle prove espressamente previste e disciplinate dalla legge, si suppone che facciano parte della categoria delle prove atipiche la cui caratteristica è quella di poter essere sempre utilizzata, salvo la presenza di uno specifico divieto.

Dunque, in ossequio a quanto previsto per la testimonianza sarebbe logico desumere l'inammissibilità di tutte le prove orali, e non solo di quelle direttamente formate e assunte nel procedimento tributario: in generale si considerano inammissibili tutte quelle prove che si sono formate all'esterno, ossia in altri processi. Eppure, la giurisprudenza consolidata ammette questa tipologia di prove, soprattutto durante lo svolgimento di un processo civile o penale. Certamente, le prove testimoniali che siano state assunte in altri processi, sono prove che hanno fruito della garanzia del contraddittorio, quindi che si sono formate nel pieno rispetto delle regole previste dai codici di procedura.

Di conseguenza, volendo tentare una risposta rispetto all'interrogativo che ci si è posti, si può affermare che il giudice tributario può basare il proprio convincimento, non solo sulle prove raccolte in sede tributaria, ma anche sulle prove acquisite nel processo penale purché, tuttavia, le sottoponga ad una sua autonoma valutazione. Così facendo, si ammette la circolazione della prova tra due procedimenti certamente autonomi ma altresì collegati da punti di contatto rinvenibili nel regime probatorio, sicuramente differenziato ma assolutamente armonizzato dal libero apprezzamento critico del giudice.

ISBN: 978-2-931089-30-9

How does the right to travel change following the Russian-Ukrainian conflict: repercussions on Italian tourism?

Giulia METALLO*
Università della Calabria - Italy

Pietro IAQUINTA
Università della Calabria - Italy

Abstract: The way of traveling between one country and another, especially if it were non-European countries, had already changed in the aftermath of the Covid-19 health emergency, which had made entry into the territories subject, in addition to the necessary documents (passport or identity card) upon presentation of a document proving that you have not contracted Covid-19. If this had already represented a negative element on the development of tourism, Russia-Ukraine took over to aggravate it.
Since Russia is not part of the Schengen area, in which it is possible to travel freely without border controls, travel to and from Russia is regulated by specific international conventions.
Italy, following the Russian-Ukrainian conflict at 3 pm on February 27, 2022, imposed a ban on travel to and from Russia for security reasons; representing this prohibition also as a sanction to Russia for having threatened peace, thus violating international agreements and the principles on which the UN is based.
The prohibition of overflight on certain areas of Italy is regulated by article 793 of the Navigation Code which assigns the power to prohibit overflight of the Italian territory to ENAC (National Agency for Civil Aviation). Certainly this has affected tourism and Ukrainian tourism in Italy, although to mitigate the, there has been the circumvention of the ban imposed by Italy: being able, in fact, the Russians to move by land and reach the countries that are all part of the area Schengen, were able to use these territories as starting points to reach Italy.
This article aims to analyze the legislation relating to travel between the Russian area and Italy and obtained the tourist impact it has had for the latter.

Keywords: war, law, tourism

1. The Schengen area

The Schengen area or area indicates an area in which the countries that are party to it under the treaty of the Schengen Convention have abolished internal borders. Specifically, the free movement of persons and goods is guaranteed in this area by replacing internal borders with a single external border, as well as by applying common rules and procedures on visas, short stays, asylum applications and border controls. It includes 26 European states.

This Convention (signed on June 19, 1990 and entered into force in 1995) does nothing but sign the so-called Schengen Agreement, an international treaty, which was signed in Schengen on June 14, 1985 between Belgium, France, Germany, Luxembourg and the Netherlands, provided for the creation of a common area to allow access for goods and people without controls common borders between the States concerned.

22 of the 27 states of the European Union adhere to the Schengen area. In particular:

* Corresponding Author: giuliametallo7@gmail.com

- Ireland has decided not to join the Schengen area;
- Cyprus, Croatia, Romania and Bulgaria have signed the Schengen Convention but required technical measures to put it into practice.

Third States also participate in this area, namely: Iceland, Norway, Switzerland and Liechtenstein. To them is added the Principality of Monaco which is part of the Schengen area through France and San Marino and the Vatican which are part of Schengen by means of the Schengen Convention ratified in Italy. Finally, Gibraltar also joined the distant data from 2021.[1]

1.2. Transfers in the non-European area

Otherwise, travel to non-EU countries is subject to border controls. In particular, in these it is not possible to travel by means of an identity card (as happens in the Schengen area) but it will be necessary to have a passport.

In addition, many countries also require the possession of a visa. As is the case, for example, for Russia, which requires an entry visa, which changes depending on the reason for the visit: tourist, business, work, humanitarian, study, private, transit or travel visa. temporary stay.

A further problem also concerns the need to stipulate a health agreement to avoid having to bear huge costs in the event of accidents or illness in the non-EU country, in which health regulations are very different from ours (in the USA, for example, there is no health charged to the State and the cost to the individual citizen is very high).

Unlike in countries that have joined the Schengen Area, it is sufficient to be in possession of the national health card.[2]

2. Movements following the Covid Regulations

Following the outbreak of the Covid-19 Pandemic, all flights between one country and another were initially suspended. Starting from 8 October 2020, two alternative preventive measures have been adopted to enter Italy. Specifically, the countries were divided into zones according to the risk of contagion:

- ***Belgium, France, the Netherlands, the United Kingdom of Great Britain and Northern Ireland, the Czech Republic and Spain:***
  - certification of having undergone, in the 72 hours prior to entry into Italy, a molecular or antigenic swab, which was negative;
  - undergo a molecular or antigenic swab upon arrival at airports, ports or border places, if possible, or within 48 hours of entering the national territory at the local health authority of reference. Waiting for the fiduciary isolation obligation test at your home or residence.
  - Notification to the ASL if in the 14 days prior to entering Italy you stayed or passed through these countries;
  - Communication of any onset of Covid-19 symptoms.

- ***For entries from Croatia, Greece and Malta***
  - Fill in a self-declaration on an ad hoc format;
  - Report the onset of symptoms compatible with Covid to the Authority.

- ***For the other EU countries (except Romania, Croatia, Greece, Malta, Belgium, France, the Netherlands, the Czech Republic and Spain) and Schengen, including Andorra and the***

[1] https://www.europarl.europa.eu/news/it/headlines/security/20190612STO54307/schengen-guida-alla-zona-europea-senza-frontiere

[2] https://www.aig.co.it/news-home/viaggiare-in-europa-i-documenti-necessari#:~:text=Per%20i%20cittadini%20dell'Unione,esibire%20alcun%20documento%20all'ingresso.

Principality of Monaco, entry and travel to EU countries (except for Romania)

- The movements are allowed without the need for motivation;
- Isolation if you have passed through or stayed in the 14 days prior to entry into Italy, in the territories of lists C, D, E, or F;
- Obligation to complete a self-declaration, except for the Republic of San Marino and the Vatican City State.

• ***San Marino and Vatican***

- No limitations

• ***Transfers to and from non-EU countries (Australia, Canada, Georgia, Japan, New Zealand, Rwanda, Republic of Korea, Thailand, Tunisia, Uruguay (List D - Annex C of the dpcm 7 September 2020).***

- Fiduciary isolation on return and completion of a self-declaration;
- There is no obligation to give reasons (therefore travel is also allowed for tourism);
- You must not have transited or stayed in the 14 days prior to entry into Italy, in the territories of lists E, or F. Upon returning to Italy, you must undergo fiduciary isolation and health surveillance, fill in a self-declaration;

• ***Transfers to and from the rest of the world***

- Movements allowed only in the presence of precise reasons (work, health or study reasons, absolute urgency, return to one's home, home or residence);
- Upon returning to Italy from these countries, it is necessary to undergo fiduciary isolation and health surveillance as well as fill in a self-declaration;

• ***Prohibition of entry into Italy***

- With the exception of EU citizens, including Italians and their family members who have registered residence in Italy before 9 July 2020
- For those coming from Armenia, Bahrain, Bangladesh, Bosnia Herzegovina, Brazil, Chile, Kuwait, North Macedonia, Moldova, Oman, Panama, Peru, Dominican Republic[3]

• ***Vaccinations***

Following vaccinations on a global scale, the movement from one state to another was subject to possession of the vaccine doses, demonstrable through the Green pass document or equivalent documents. However, not all countries of destination accepted the Green Pass and it was therefore necessary to show this document only before embarking on Italian vehicles, so it was necessary to inquire about the documents required by the individual countries upon arrival. In addition, the obligation was imposed to wear the FFP2 mask on public transport, this obligation lapsed from 1 October 2022.

From 1 June 2022, the Green Pass or other equivalent certification is no longer required for entry / return to Italy from abroad.

3. Italy-Russia-Ukraine trips

3.1. Traveling from Italy to Russia

As mentioned, in order to travel to states that are not part of the Schengen Area, it is not enough to be in possession of an identity card. As regards Russia, in particular, the necessary documents are the following:

[3] https://www.ilsole24ore.com/art/tamponi-e-quarantene-ecco-regole-viaggiare-tempo-coronavirus-ADi6NWu

- passport with a residual validity of at least 6 months. (Russian authorities often also require the document to be in excellent condition);
- compulsory entry visa;
- health insurance;
- immigration card, to be filled in upon arrival at the airport, and possibly an international driving license.[4]

Following the outbreak of the Covid-19 pandemic, additional rules were introduced.

The main document regulating the entry of foreigners into Russia during the Covid-19 pandemic is Government **Order No. 635-r** (dated March 16, 2020), which is regularly updated.

On the basis of this document, travelers coming from:

- United Kingdom, Tanzania, Turkey and Switzerland (from 1 August 2020)
- Egypt, Maldives and United Arab Emirates (from 2 September 2020)
- Kazakhstan, Kyrgyzstan and South Korea (from 20 September 2020)
- Cuba, Serbia and Japan (from 14 October 2020)
- Seychelles and Ethiopia (from 13 November 2020)
- Vietnam, India, Qatar and Finland (from 25 January 2021)
- Azerbaijan and Armenia (from 3 February 2021)
- Greece and Singapore (from 12 February 2021)
- Venezuela, Germany, Syria, Tajikistan, Uzbekistan and Sri Lanka (from 31 March 2021)
- Iceland, Malta, Mexico, Portugal and Saudi Arabia (from 24 May 2021)
- Austria, Hungary, Lebanon, Luxembourg, Mauritius, Morocco and Croatia (since June 18, 2921)
- Belgium, Bulgaria, Jordan, Ireland, **Italy**, Cyprus, China, Liechtenstein, North Macedonia and the United States (from 28 June 2021)
- Albania, France and the Czech Republic (from 28 July 2021)
- Bahrain, Dominican Republic and Moldova (from 4 August 2021)
- Iraq, Spain, Kenya and Slovakia (from 21 September 2021)
- Bahamas, Iran, the Netherlands, Norway, Oman, Slovenia, Thailand, Tunisia and Sweden (from 23 October 2021)
- Argentina, Bangladesh, Brazil, Costa Rica and Mongolia (from 2 December 2021)[5]

On July 5, 2021, for the first time in 15 months, Russia, with **decree no.1745 of June 28, 2021**, restored the possibility for Italian citizens to enter the country.

As of this provision, all passengers coming from abroad must undergo a molecular swab within 72 hours before entry and present the certificate of negativity in Russian or English, to enter the country. If it is not possible to produce it in the following languages, an official of the Russian Federation will verify the validity of the document drawn up in another language, by translating it.

Anyone without such documentation will have to undergo the test for Covid-19 within three days of arrival in Russia, and if the test result is positive, a period of self-isolation until negativization must be observed.

Before entering Russia, you will then have to fill in a questionnaire on the website of the Federal Service.

Russian citizens, on the other hand, will not have to present the certificate upon boarding, but will have to register on the *Gosuslugi* website. They will then perform a swab within three days of arrival and upload the result to the site on which they registered.

From July 15, the mandatory 14-day quarantine for those who return to the Federation from abroad is abolished.

[4] https://www.assicurazione-viaggio.axa-assistance.it/consigli-e-informazioni/documenti-di-viaggio/documenti-viaggio-russia

[5] https://rusalia.it/stranieri-viaggiare-russia-requisiti-coronavirus/

3.2. Traveling from Russia to Italy

In order to enter Italy from Russia it is necessary to possess:

- Passport;
- Visa for short-term stays, valid up to 3 months, and for long-term stays which involve the granting of a (long-term) residence permit with the same reason as that of the visa;
- For stays of less than three months, visas issued by diplomatic authorities of other States with which Italy has ratified agreements, or on the basis of EU regulations, are considered valid.[6]
- Health insurance with minimum coverage of € 30,000 (in the case of travel for tourism).

For entry into Italy from Russia, during the Covid-19 pandemic, all passengers were required to carry a molecular or antigenic swab carried out within the previous 72 hours.

From 1 June 2022, the Green Pass or other equivalent certification is no longer required for entry or return to Italy.[7]

3.3. Traveling from Italy to Ukraine

Italian citizens who want to visit Ukraine do not need a visa if they are traveling as tourists and intend to stay for up to 90 days. Only a passport valid for at least 3 months is required.

Furthermore, following the Covid-19 pandemic, the possession of:

- a document confirming that a complete course of vaccination against COVID-19 has been carried out;
- or alternatively a rapid test for SARS-CoV-2 (RAT) antigen carried out no more than 72 hours before entry;
- or a certificate of a negative PCR test result carried out no more than 72 hours prior to entry.
- these documents are not required for children under the age of 12;
- possession of a health insurance policy that explicitly provides for Covid-19 coverage valid for the entire duration of the stay in the country

These documents must be in English or in any case accompanied by an English translation.

In the absence of the possession of the insurance policy and one of the documents indicated above, the Ukrainian Border Authorities can deny entry to the Pass to foreigners and stateless persons.

Furthermore, as of August 5, 2021, all Ukrainian and foreign citizens over 18 who want to enter Ukraine and have not been vaccinated against the coronavirus must install the *Vdoma* mobile application and agree to undergo a period of fiduciary isolation. 10 days starting 72 hours after their entry into Ukraine. Fiduciary isolation will not be necessary in the event of a negative test result. During the 72 hours, the interested party can leave the country even without undergoing tests or perform a PCR test or a rapid test for the SARS-CoV-2 antigen.

Unvaccinated persons from or in transit from Russia and India, and who have been in those countries for more than 7 days in the 14 days prior to entering Ukraine, will have to undergo fiduciary isolation for 14 days and will not be able to reduce or avoid this isolation period following a negative PCR or rapid antigen test.[8]

3.4. Traveling from Ukraine to Italy

In order to enter Italy from Ukraine, you must have:

- biometric passport;
- entry visa, which will not be necessary in case of stay for tourist reasons for a maximum of 90 days, from the date of entry into the Schengen area;

[6] https://www.missionline.it/visto-russia-italia/
[7] https://www.viaggiaresicuri.it/find-country/country/NLD
[8] https://ambkiev.esteri.it/ambasciata_kiev/it/informazioni_e_servizi/spostamenti-da-verso-l-ucraina.html

- if your passport bears a stamp of a Schengen country within eight days of entering Italy, you must go to the police headquarters of the place where you live to fill in the declaration of presence;[9]
- if you arrive in Italy from a third country not belonging to the Schengen area, the entry stamp on the passport is affixed by the Italian border police. (It will not be necessary to make the declaration of presence).[10]

Until January 31, 2022, due to the Covid-19 pandemic, entry into Italy was allowed only for specific reasons:

- work;
- health;
- study;
- absolute urgency;
- return to your home, home or residence.

Furthermore, travel for tourism to List E countries, of which Ukraine was part, was not allowed.

Upon returning to Italy from these territories, the following was required:

- Fill in an online localization form (so-called digital Passenger Locator Form, dPLF);
- Present to the carrier the certificate certifying the negative result of a molecular test conducted with a swab, carried out in the seventy-two hours prior to entering Italy;
- Alternatively, present the certificate certifying the negative result of an antigen test conducted with a swab, carried out in the twenty-four hours prior to entry into Italy;
- Undergo in any case fiduciary isolation and health surveillance (informing the competent ASL to activate the surveillance) for a period of ten days;
- At the end of the ten days of fiduciary isolation, it is mandatory to carry out a further molecular or antigen test, conducted with a swab.[11]

Exceptions were made to the possession of these documents, except for the compilation of the digital Passenger Locator Form, travelers who went to Italy for proven business reasons for less than 120 hours, provided they did not present symptoms compatible with Covid-19. All diplomatic officials and law enforcement agents were also exempt from the requirements of fiduciary isolation and subsequent testing.

From 1 June 2022, the Green Pass or other equivalent certification is no longer required for entry / return to Italy from abroad.

4. Legislation following the Russian-Ukrainian conflict

Italy, following the Russian-Ukrainian conflict at 3 pm on February 27, 2022, imposed a ban on travel to and from Russia for security reasons; this prohibition also constitutes a sanction to Russia for having threatened peace, thus violating international agreements and the principles on which the ONU is based.

The ban on overflight on certain areas of Italy is regulated by Article 793 of the Navigation Code which assigns the power to prohibit overflight of the Italian territory to ENAC (National Civil Aviation Authority).

This article specifically prescribes: "ENAC may prohibit overflight on certain areas of the national territory for reasons of security or public order at the request of the competent administration." However, the opening of the airspace to flights from the Russian Federation ordered by the European Union on February 27, has not yet been restored, so the Government

[9] https://www.interno.gov.it/it/temi/immigrazione-e-asilo/modalita-dingresso
[10] https://www.cgil.lombardia.it/vademecum-per-i-cittadini-provenienti-dallucraina/
[11] https://ambkiev.esteri.it/ambasciata_kiev/it/informazioni_e_servizi/spostamenti-da-verso-l-ucraina.html

has recommended all compatriots present in Russia to plan their trips as much as possible in advance towards abroad.

On 31 August 2022 the EU foreign ministers, meeting in Prague, decided, following the prolongation of the Russian-Ukrainian conflict, to suspend the facilitation agreement between the European Union and Russia for the issuance of visas to Russian citizens: this has made it more difficult for Russian tourists to enter Italy but also Europe.

However, Italy is currently reachable via indirect flights, that is to say, which are hot on territories not covered by sanctions. This has partly made it possible to circumvent the obstacle, although entry into Italy is certainly more difficult.

On the other hand, as regards trips to Ukraine, these are not recommended and an appeal was made to fellow countrymen present in the territory to leave the country.

5. Russian tourism in Italy in the light of Covid-19 and the Russian-Ukrainian conflict

The Bank of Italy carried out surveys on international tourism for both the year 2020 and the year 2021.[12]

Tab. 1. *Analysis of the economic impact compared to pre-pandemic and war levels*

Spesa per viaggi all'estero per paese di origine
(miliardi di euro e variazioni percentuali sull'anno precedente)

	2018	2019	2020	2020
	miliardi di euro			var. %
Mondo	**1.219,0**	**1.309,0**	**471,0**	**-64,0**
Cina	234,8	227,4	114,3	-49,7
Germania	80,9	83,3	35,9	-56,9
USA	106,7	120,2	34,4	-71,4
Francia	41,4	46,1	24,5	-46,9
Regno Unito	60,0	64,2	19,0	-70,4
Corea (Rep. di)	29,7	29,2	14,1	-51,7
Canada	29,2	32,0	10,6	-66,9
Italia	25,5	27,1	9,6	-64,7
Russia	29,0	32,3	8,0	-75,2
Spagna	22,4	24,9	7,7	-69,1
Singapore	22,5	24,4	6,0	-75,4
Australia	31,3	32,1	5,9	-81,6
Hong Kong	22,4	24,0	4,7	-80,4
Emirati arabi	15,2	23,8	..	..
India	18,1	20,5	..	..

Fonte: elaborazioni su dati UNWTO, *World Tourism Barometer* (maggio 2021) e, per l'Italia, Banca d'Italia; spese riferite al complesso dei visitatori (turisti ed escursionisti).
Note: la tavola riporta i primi 15 paesi per spesa a prezzi e cambi correnti nel 2019, in ordine decrescente sulla base della spesa nel 2020. Per Emirati Arabi e India il dato sulla spesa per viaggi all'estero nel 2020 non è ancora disponibile.

Source: Banca d'Italia, *indagine sul turismo internazionale*, 2021-2022

Spesa per viaggi all'estero per paese di origine
(miliardi di euro e variazioni percentuali sull'anno precedente)

	2019	2020	2021	2021
	miliardi di euro			var. %
Mondo	**1.324,0**	**478,0**	**509,0**	**6,5**
Cina	227,4	114,7	89,4	-22,1
USA	119,1	31,4	49,0	56,1
Germania	83,3	34,0	40,7	19,7
Francia	45,1	24,3	29,4	21,0
Regno Unito	63,1	19,0	20,5	7,9
Corea (Rep. di)	29,2	14,1	14,1	0,0
Italia	27,1	9,6	12,6	32,0
Belgio	16,8	11,4	12,4	8,8
India	20,5	11,0	10,6	-3,6
Spagna	24,8	7,6	10,0	31,6
Russia	32,3	8,0	9,6	20,0
Svizzera	16,9	9,0	9,5	5,6
Qatar	8,5	5,9	8,5	44,1
Paesi Bassi	18,3	6,2	7,8	25,8
Arabia Saudita	13,5	7,7	7,5	-2,6

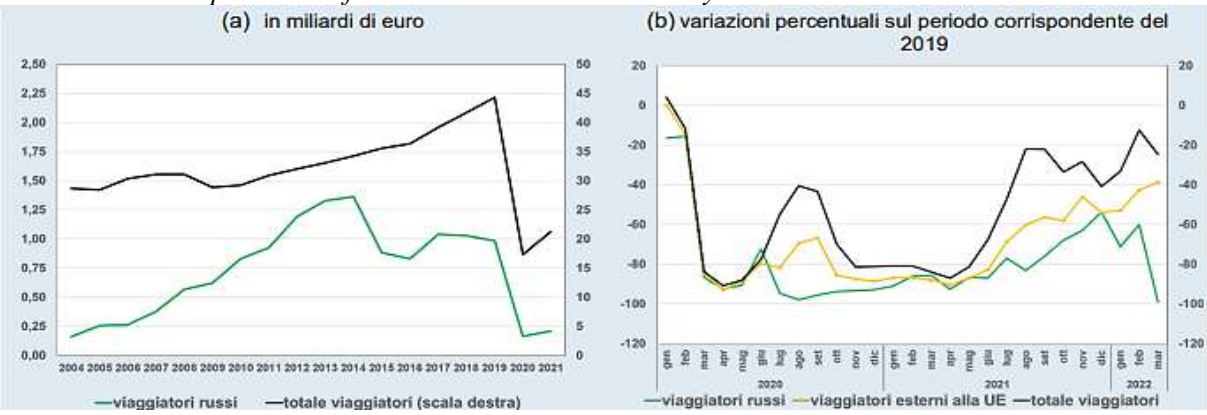
Fonte: elaborazioni su dati UNWTO, *World Tourism Barometer* (maggio 2022) e, per l'Italia, Banca d'Italia; spese riferite al complesso dei visitatori (turisti ed escursionisti).
Note: la tavola riporta in ordine decrescente i primi 15 paesi per spesa a prezzi e cambi correnti nel 2021.

In the first table, which refers most recently to 2020, we can see how Russian spending in Italy has gone from 29.02 billion euros in 2019, passing from 32.3 billion euros in 2019, to 8.0 billion euros. in 2020 (the year in which the Covid 19 pandemic broke out). A slight improvement was recorded in 2021, following the easing of Covid-19 prevention measures, recording an expenditure of 9.6 billion euros: therefore, a higher expenditure of 1.6 billion euros.

Following the outbreak of the Russian-Ukrainian conflict, significant restrictions on international travel for Russian citizens were introduced. This resulted in a contraction in Russian spending on tourism for Italy in 2022. In fact, by analyzing the flow of the Russian economy in Italy, it resulted that in:

[12] https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/2021-indagine-turismo-internazionale/statistiche_ITI_18062021.pdf

Tab. 2. *Tourist expenditure of international travelers in Italy*



Source: Banca d'Italia, *indagine sul turismo internazionale*, 2021-2022

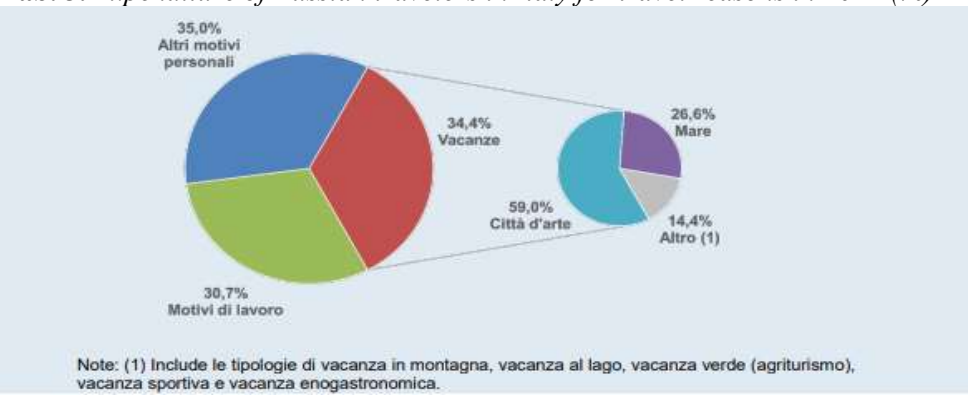
- 2004: minimum point of the time series;
- 2014: peak of growth;
- Subsequent two-year period: income reduced by more than a third; the Russian invasion of Crimea and the sharp drop in the price of oil contributed to this;
- 2017: partial recovery;
- 2018-2019: stable expenditure;
- 2020: reduction in Russian revenues greater than those attributable to tourists from all countries outside the European Union;
- 2021: on average in 2021, the spending of Russian travelers amounted to only 0.2 billion (1 percent of Italy's total tourism revenues);
- 2022: abrupt interruption of the gradual recovery following the outbreak of the war, when the spending of Russian travelers in Italy was substantially canceled.

Regarding the characteristics of the spending of Russian tourists, in 2021 the share for business trips and for holidays were comparable, equal to about one third each. The Russian preferences turn out to be travels and in fact the following data were obtained:

- 59% of spending: vacationers arriving from Russia headed mainly to the cities of art;
- 27% in seaside resorts, mainly using accommodation facilities such as villages and hotels (over half of the expenditure);
- 40% accommodation expense, in line with that of other international travelers;
- 24% higher shopping than other international travelers (24% for Russian tourists and 20% for others).[13]

All this is reported in the tables below:

Tab. 3. *Expenditure of Russian travelers in Italy for travel reasons in 2021 (%)*



Source: Banca d'Italia, *indagine sul turismo internazionale*, 2021-2022

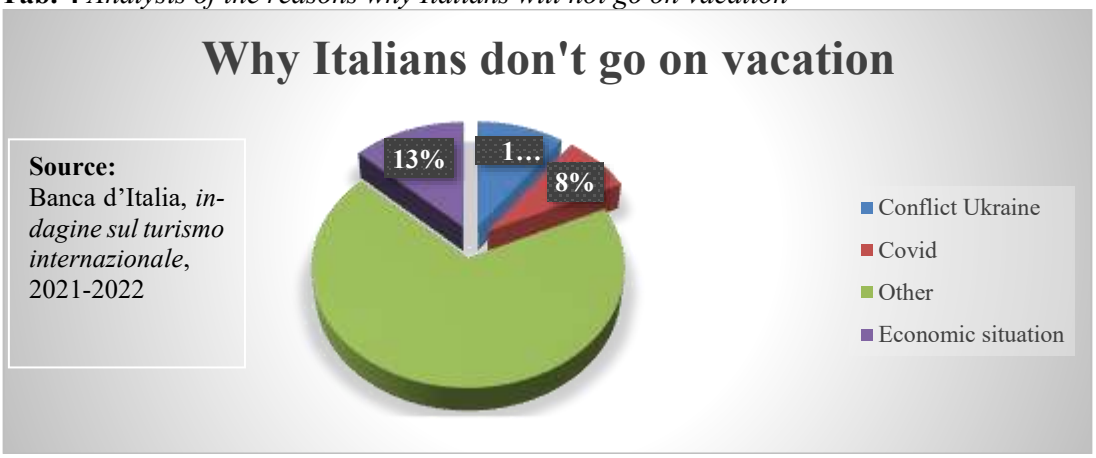
[13] https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/2022-indagine-turismo-internazionale/statistiche_ITI_16062022.pdf

Based on the Demoskopika survey published on the occasion of the Bit, the International Tourism Exchange, it has been estimated for 2022 the absence from Italy of over 300 thousand Ukrainian and Russian tourists with a reduction of 2.4 million presences and a contraction of tourist spending for almost 180 million euros.[14]

At the same time, the war has contracted Italian tourism abroad. Following a research it emerged that 31% of compatriots who gave up their vacation in 2022[15]

- 10% do so out of fear of the effects of the conflict in Ukraine;
- 8% due to the persistence of Covid and its variants;
- 13% due to a worsening of the family's economic situation compared to last year.

Tab. 4 *Analysis of the reasons why Italians will not go on vacation*



6. Conclusions

In the light of the analysis carried out, it is clear that both the Covid-19 pandemic and the Russian-Ukrainian war have had a negative impact on Russian and Ukrainian tourism in Italy but also of Italy abroad. In fact, following these events, the Italian people found themselves not only faced with the fear of such events, which discourage them from moving, but also in far worse economic conditions which resulted in giving up consumption such as tourism. . It seems necessary to provide incentives for travel in order to avoid a blockage of tourism with consequent further repercussions on the economy.

References

https://www.rainews.it/articoli/2022/04/turismo-la-guerra-in-ucraina-e-il-covid-fermano-circa-11-milioni-italiani--27b92e70-6799-434a-8cf2-97d3a7a88ccc.html

https://www.ansa.it/nuova_europa/it/notizie/nazioni/ucraina/2022/04/11/turismo-guerra-in-ucraina-e-covid-fermano-11-mln-italiani_5044f3ba-b3dd-4eaf-bf85-7a8bfcbc313c.html

https://ambkiev.esteri.it/ambasciata_kiev/it/informazioni_e_servizi/spostamenti-da-verso-l-ucraina.html

https://www.cgil.lombardia.it/vademecum-per-i-cittadini-provenienti-dallucraina/

[14] https://www.rainews.it/articoli/2022/04/turismo-la-guerra-in-ucraina-e-il-covid-fermano-circa-11-milioni-italiani--27b92e70-6799-434a-8cf2-97d3a7a88ccc.html

[15] https://www.ansa.it/nuova_europa/it/notizie/nazioni/ucraina/2022/04/11/turismo-guerra-in-ucraina-e-covid-fermano-11-mln-italiani_5044f3ba-b3dd-4eaf-bf85-7a8bfcbc313c.html

https://ambkiev.esteri.it/ambasciata_kiev/it/informazioni_e_servizi/spostamenti-da-verso-l-ucraina.html

https://www.missionline.it/visto-russia-italia/

https://www.interno.gov.it/it/temi/immigrazione-e-asilo/modalita-dingresso

https://www.viaggiaresicuri.it/find-country/country/NLD

https://www.assicurazione-viaggio.axa-assistance.it/consigli-e-informazioni/documenti-di-viaggio/documenti-viaggio-russia

https://rusalia.it/stranieri-viaggiare-russia-requisiti-coronavirus/

https://www.ilsole24ore.com/art/tamponi-e-quarantene-ecco-regole-viaggiare-tempo-coronavirus-ADi6NWu

https://www.europarl.europa.eu/news/it/headlines/security/20190612STO54307/schengen-guida-alla-zona-europea-senza-frontiere

https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/2021-indagine-turismo-internazionale/statistiche_ITI_18062021.pdf

https://www.bancaditalia.it/pubblicazioni/indagine-turismo-internazionale/2022-indagine-turismo-internazionale/statistiche_ITI_16062022.pdf

ISBN: 978-2-931089-30-9

The Italian and Maltese 'Closed Port' Policy to Irregular Migrants by Sea: Discriminated and Stranded-off at Sea in Violation of International Human Rights Law

Enkelejda KOKA*
University College Beder, Tirana - Albania

Abstract: The year 2020 came with a negative and devastating impact upon the world, caused by the pandemic Sars-Covid-19 (Covid-19). The pandemic obliged many states to declare a state of emergency. Italy and Malta adopted special emergency laws allowing the addition of powers to specific governmental authorities dealing with infectious diseases,arguably ac-ting as adequate mechanisms to respond to the present emergency. The Italian and Maltese exercise of emergency powersdid not only affect the subjects within Italian and Maltese territorial jurisdiction, but it also touched upon and produced adverse legal effects relating to irregular migration by sea. This research analyses how border enforcement measures and closed border policies under the pretence of the pandemic have negatively impacted upon the rights of refugees and asylum seekers travelling in an irregular manner by sea. Although it is recognised that Italy and Malta have the right to protect its people from the pandemic and take such positive steps to prevent threats to public health, it is argued here that it can-not do so by ignoring rescued individuals discriminately only because of their immigration status. Nor can they ignore their obligations on the right to health for those under its juri-sdiction, as well as other obligations under international and EU law.

Keywords: Irregular migration; Closed Port Policy; Covid-19; Emergency powers

Introduction

The pandemic Sars-Covid-19 (Covid-19) obliged every country worldwide to apply emergency measures in the form of quarantine actions of large areas, closing schools and universities, closing private businesses, limited opening hours and free movement in parks and other public areas, restricting access to old peoples' care homes, the restriction of public assemblies and many more which in return triggered an economic crisis. The aim behind restricting freedom of movement was to protect risk groups under Covid-19 threat from being isolated away from potentially infected people. The Italian and Maltese exercise of emergency powers did not only affect the subjects within Italian and Maltese territorial jurisdiction, but it also touched upon and produced adverse legal effects relating to irregular migration by sea (CDL-AD(2017)005, Turkey-Opinion, paragraph 73). Confronted for more than a decade with the massive arrivals (Triandafyllidou, Anna, and Angeliki Dimitriadi, 2013, 598-618; Kumin, Judith, 2014; Tahir, Nathalie, and Camille Schmoll, 2014, 87-102) of irregular migrants[1] via the central Mediterranean route (Libya to Italy

* Corresponding Author: enkelejdakoka@gmail.com
[1] IOM defines irregular migration as 'movement that takes place outside the regulatory norms of the sending, transit and receiving countries. The term 'irregular migrant' includes asylum seekers, refugees, trafficked and

and Malta), Italy and Malta raised the pandemic card justification to resort to overly restricted extraterritorial measures against irregular migrants arriving by sea. This research analyses how border enforcement measures and closed border policies under the pretence of the pandemic have negatively impacted upon the rights of refugees and asylum seekers travelling in an irregular manner by sea (Brachet, J. 2018, 16-35).

Under the pretence of health risks, Italy chose to close its ports to rescue people from March 2019. On 18 March 2019 and 15 April 2019, the Italian government issued Directives stating that 'vessels, either with Italian or foreign flag, rescuing migrants in waters that are outside Italy's responsibility and without the coordination of the authority internationally recognized as competent for coordinating rescue activities and subsequently entering Italian territorial waters, harm the good order and security of the Italian State', 'prerequisites for the designation of a place of safety in Italian ports are lacking'. The Italian government considered these private vessels to conduct their operations 'with the aim to circumvent national legislation on border control and regular migration', 'a threat to public order and national security of the coastal State' (Legislative Decree no. 286/1998, Article 11). The decree became law in October 2019. It was only on 21 February 2020, that Italy went into its first lockdown by declaring a national state of emergency. Subsequently, on 7 April 2020, Italy maintained its declaration of its ports as 'unsafe' for the disembarkation of rescued people from boats flying a foreign flag 'for the duration of the national public health emergency' (The Guardian, 2020). This measure was supported under the argument that 1) Italy could not guarantee the safety of the individuals due to the outbreak and 2) rescued people might have contracted Covid-19 (The Guardian, 2020). The underlying aim of such drastic measures was to stop rescue operations conducted by NGOs or other vessels at international waters.

Under similar pretences, on 9 April 2020, the Maltese government closed its ports as being 'unsafe' arguing Malta cannot guarantee the safety of rescued migrants' lives due to the Covid-19 pandemic (Times of Malta, 2020). The Maltese government took such a decision whilst considering the balance between 'the control over the Maltese territory and the compliance with Malta's international obligations whilst addressing this public health emergency including the enforcement of effective measures already put in place for the containment of the spread of the contagious disease adopted so far' (Times of Malta, 2020). Libya followed with the same declaration, considering its ports unsafe and it refused authorisation to disembark 280 migrants intercepted by the Libyan Coast Guard (IOM UN, 2020). Also, according to the Libyan government the Tripoli port was declared as 'unsafe' for disembarkation purposes due to the *al-Sarraj* government lack of control over the port caused by the continuous internal conflict.
After the declarations were made, on 10 April 2020, more than 150 rescued people were stranded at sea waiting to be disembarked in a safe port of disembarkation (ECRE, 2020). These individuals were rescued by the NGO vessel *Sea Eye* in international waters off the Libyan coast. According to NGO Alarm Phone allegations, the irregular migrants were forced to jump into water after being hindered by Libyan militia firing shots towards their vessel. There were no efforts of rescue made by the Italian supply ship present at the location. Once stranded at sea for days or weeks, the individuals have suffered from starvation, dehydration, suffocation and even violence from human smugglers (Amnesty International, 2015, 6, 11). During the month of April 2020, 241 people were reported to have died whilst trying to reach Europe (IOM, Missing Migrants Projects).

Although it is recognised that Italy and Malta have the right to protect its people from the pandemic and take such positive steps to prevent threats to public health, it is argued here that it cannot do so by ignoring rescued individuals discriminately only because of their immigration

smuggled persons, unaccompanied children, stateless persons, economic migrants and displaced persons. IOM, Key Migration Terms <https://www.iom.int/key-migration-terms> accessed 13 September 2022.

status. Nor can they ignore their obligations on the right to health for those under its jurisdiction, as well as other obligations under international and EU law. It is somehow understandable that mobility restrictions have been a necessary response to Covid-19, however, it is observed and analysed in this study that the pandemic is being used by Italy and Malta in an abusive opportunistic measure to prevent irregular migrants' arrival. Italy and Malta have an international and EU responsibility to 1) provide medical care and a safe place of disembarkation and 2) provide access to its asylum and immigration law once it rescues these individuals. In accordance with international human rights law, states are obligated to take positive steps to prevent threats to public health and to provide medical care to those who need it. Everyone has the right and is entitled to the highest attainable standard of health. Such a right though requires governments to restrict on some other rights when confronted with serious public health threats; however, it is also noted that such restrictions can only happen under a justifiable legal basis. These restrictions must be proportionate, necessary, and applied for a limited duration and most importantly *not* arbitrary and discriminatory in application. In addition, states have the obligation to ensure for those under their jurisdiction; adequate medical care equivalent to that it has available for its general population. Therefore, in relation to the irregular migrants' boats found in its territory or under its jurisdiction at sea, the state must not deny to asylum seekers and irregular migrants' equal access to health care.

The Italian and Maltese decision to close ports provides for the arbitrary selection of vessels that are denied access to Italian and Maltese territory that is supposed to be deemed 'unsafe'. Such a decision obliges the rescued individuals to be indirectly returned to Libya (being a gross human rights violator and an unsafe place for disembarkation), as the only available place of disembarkation. The Italian decision constitutes in effect an indirect form of *refoulement* in violation of international obligations and human rights law.

The 'closed ports' policy is argued in this paper to constitute an indirect form of illicit return to an unsafe country such as Libya, a known gross human rights violator. UN and NGO have reported and documented the various human rights abuses that migrants are subjected in Libya such as 'trafficking in persons , prolonged arbitrary detention in inhuman conditions, torture and ill-treatment, unlawful killings , rape and other forms of sexual violence, forced labour, extortion and exploitation' (EU Joint Communication, AL ITA 4/2019, 5). Libya cannot be considered a safe place for disembarkation purposes (OHCHR and UNSMIL, 2018). Therefore, once under Italian territory or jurisdiction, the rescued migrants should be identified as potential victims of trafficking in which Italy has the obligation to protect and provide assistance to victims of trafficking (Article 6 of Protocol to Prevent, Suppress and Punish Trafficking in Persons Especially Women and Children, supplementing the United Nations Convention against Transnational Organized Crime). As provided in the OHCHR Recommended Principles and Guidelines on Human Rights and Human Trafficking, a failure by the State to identify a trafficked person correctly 'is likely to result in a further denial of that person's rights'. To conduct a proper identification of vulnerabilities and protection needs, the rescued migrants must be disembarked in a safe place (UN General Assembly, 2018). Such a practice is contrary to the prohibition of collective expulsions and the *non-refoulement* principle.

This Decree violates the rights of persons seeking asylum as well as the victims of trafficking in persons, victims of torture and arbitrary detention. The Decree also fails to take into consideration the state's international human right obligation, the non-derogable 'right to life', arising during search and rescue operations (ICCPR, Article 6; ECHR, Article 2; UN Human Rights Committee, 2019, CCPR/C/GC/36, paras 2-3). Most certainly, the right to life prevails over national and EU legislation, administrative acts, or policies on 'irregular migration' and/or bilateral agreements. Protection of this fundamental right is further expressed in the saving clauses of article 19 of the Protocol Against the Smuggling of Migrants by Land, Sea and Air, as well as, in the saving clauses of article 14 of the Protocol to Prevent, Suppress and Punish

Trafficking in Persons Especially Women and Children, both supplementing the United Nations Convention against Transnational Organized Crime.[2] These protocols clearly state that 'nothing in this Protocol shall affect the other rights, obligations and responsibilities of States and individuals under international law, including international humanitarian law and international human rights law and, in particular, where applicable, the 1951 Convention and the 1967 Protocol relating to the Status of Refugees and the principle of *non-refoulement* as contained therein'. Thus, any laws and policies constitute a violation of Article 6 of the ICCPR if their aim is to prevent the 'provision of lifesaving and life-sustaining services to populations because of their ethnicity, religion or immigration status' (OHCHR, Joint Communication from Special Procedures, 2019).

Not only Italy and Malta cannot evade its responsibilities under international human rights and obligation, but they cannot also stop other actors such as captains of NGO rescue vessels by discriminative motives from respecting and fulfilling their obligations on the right to life (UN General Assembly, 2018, A/73/314). Italy and Malta have an obligation to abide by the International Convention on the Elimination of All Forms of Racial Discrimination (See articles 1, 2, 5 and 6). Related to the immigration status, the Committee on the Elimination of Racial Discrimination (CERD) has clearly clarified in its Recommendation 30 on Discrimination against Non-Citizens (2004) that "differential treatment based on citizenship or immigration status will constitute discrimination if the criteria for such differentiation, judged in the light of the objectives and purposes of the Convention, are not applied pursuant to a legitimate aim, and are not proportional to the achievement of this aim" (paragraph 4). Thus, the CERD reminded Italy that its laws and policies on immigration, deportation and other forms of removal of non-citizens do not discriminate in object or effect on the basis of immigration status (Paragraphs 7, 9 and 25). Thus, it is Italy's and subsequently Malta's duty to ensure that legislative guarantees are provided to the irregular migrants at sea having regards to providing equal access to effective remedies with full respect of the principle of *non refoulement* and the prohibition of collective expulsions (paragraph 27).

State of Emergency and Human Rights Restrictions

The state of emergency grants temporarily exceptional powers to the executive, declared in situations of civil unrest, terrorist attacks, natural disasters, pandemics, war and military threats. To legitimate its declaration of a state of emergency, the state has to prove that the only way to tackle the exceptional situation is not through normal legislation, but with exceptional powers with the aim to return to the normal situation. The exceptional measures taken by the state depend on the nature, severity, and duration of the so declared exceptional situation. At national level, each state defines the circumstances that might give rise to a state emergency, normally enshrined in its constitution.

The challenge as posed by the pandemic, necessarily, necessitated the use of emergency powers, however, its usage simultaneously conflicts with the rule of law and curtails fundamental rights. The pandemic caused by Covid-19, affected the enjoyment of human rights in various areas of law. Amongst the immediate measures taken by the Italian and Maltese governments related to the area of interest in this paper, is the 'closed port' policy to vessels who rescue irregular migrants at sea. Despite the margin of appreciation left to states exercising these emergency powers, international law, however, through international human rights treaties, international customary law and general principles of international law, impose limits on these types of regulations at national level (*Ireland* v the *United Kingdom*, 1978, paragraph 207). Their

[2] Italy ratified these Protocols on 2 August 2006.

exercise of powers is still under the supervision of the ECtHR (Turkey -Opinion on the Legal Framework governing Curfews, CDL-AD (2016)010, paragraph 67).

International human rights treaties, such as ICCPR and ECHR require that when states adopt emergency measures derogating from human rights, they can do so only if the exceptional situation meets the definition of 'public emergency which threatens the life of a nation' (ICCPR, Article 4; ECHR, Article 15). The ICCPR requires that a derogation from human rights can only take place if the state of emergency has been officially proclaimed (Venice Commission, CDL-STD(1995)012, Emergency Powers,1995, page 30) through *de jure* action in accordance with their constitutional emergency powers, preceding the activation of the emergency powers (ICCPR, Article 4(1), Venice Commission, CDL-STD(1995)012, Emergency Powers,1995, page 30). Based on the drafting of Article 4 of the ICCPR, the ECHR, allows in its Article 15 for contracting states to derogate from its obligations under the Convention only in exceptional circumstances and in a limited and supervised manner. However, in its Article 15(2) ECHR it explicitly states that no derogation is permitted from the fundamental rights as provisioned in Article 2 ECHR (Right to Life), Article 3 ECHR (Prohibition of Torture), Article 4(1) ECHR (Prohibition of Slavery and Servitude) and Article 7 ECHR (No Punishment Without Law) of the Convention. Thus, to be valid, the derogation must be justified in 1) time of war or other public emergency threatening the life of the nation, 2) the measures do not go beyond the extent strictly required by the exigencies of the situation and 3) the measures must not be inconsistent with the State's other obligations under international law (ECtHR, Guide on Article 15). ECtHR has defined 'public emergency threatening the life of the nation' to refer to 'an exceptional situation of crisis or emergency which affects the whole population and constitutes a threat to the organised life of the community of which the State is composed'. Such an emergency should be actual or imminent (*Lawless* v *Ireland* (no. 3), 1961, paragraph 28) and the danger should be exceptional in that the normal measures or restrictions permitted by the Convention for the maintenance of public safety, health and order are plainly inadequate (*Ireland* v *the United Kingdom*, 1978, paragraph 205; *Aksoy* v *Turkey*, 1996, paragraph 70; *Denmark, Norway, Sweden and the Netherlands* v *Greece (the "Greek case"),* Commission report, 1969, paragraph 153).

The declaration of a state of emergency becomes valid only after it has been approved by parliament, despite whether it has been initiated / declared by parliament itself or the Executive. During such situation, the executive exercises exceptional rules in response to overcoming the exceptional situation that threatens that state. It is precisely this co-existence between the norm and the exceptions that creates a dichotomy during the existence of the state emergency that poses challenges to the rule of law and respect for fundamental rights. Although it is recognised that in a state of emergency the executive receives increased power out of the normalcy provided by constitutional limitations, nonetheless, even during the situation of state emergency, the principle of rule of law prevails (CDL-AD(2011)049, Opinion on the draft law on the legal regime of the state of emergency of Armenia, paragraph 44). The executive must nonetheless operation within the limits of the rule of law and their actions are still subject to judicial review whereby the security of individuals is guaranteed (*ibid*). However, despite the exceptional situation, the state must ensure to minimize the damage caused to fundamental rights and the rule of law (CDL-AD(2006)015, Opinion on the Protection of Human Rights in Emergency Situations, paragraph 34).

Thus, the exceptional measures are subject to the principle of necessity, proportionality, and the condition of temporariness (*Brannigan and McBride* v *the United Kingdom*, 1993, paragraph 43; *A. and Others* v *the United Kingdom* [GC], 2009, paragraph 173). The principle of necessity requires that the state adopts only those measures that are necessary and may be justified to overcome the exceptional situation with the aim to return to the normal situation. To abide by this principle, state measures adopted during the state of emergency must be adopted

only during the limited period that the emergency exists, and to be immediately terminated after the emergency has passed. The principle of proportionality requires that the adopted measures are not disproportionate to the legitimate aim of addressing the exceptional situation in terms of their severity and covered geographical area. Logically, even in times of emergency, the state must choose to adopt measures that are less radical. Equally, it cannot be expected that the emergency measures continue to exist after the exceptional situation has ceased. Once the exceptional situation ends, the emergency measures must be terminated (SG/Inf(2020)11, 7 April 2020, paragraph 2.2). Thus, the condition of temporariness requires that the executive does not abuse its power by introducing permanent changes to the constitution, legislation or in its administration under the justification of the exceptional situation.

Conclusion and Recommendations

The decision to close national ports amid the pandemic is an attempt by the Italian and Maltese governments to use the pandemic as an excuse to evade their responsibilities under international law. Any measures taken on public health grounds must be proportionate and non-discriminatory. These restrictions imposed in the name of the pandemic have raised concerns from a legal perspective as being disproportionate when considering that the same restrictions adopted with the aim of protecting one's health become the cause of death of hundreds of irregular migrants.

Italy and Malta cannot justify their evasion of international responsibility nor infringe their international duties, i.e. to provide access to asylum and not return any person to a place where they will face a risk of torture or other ill-treatment under the blanket ban on disembarkation. It continues to be a responsibility upon Italian and Maltese authorities, to disembark those rescued to their ports and ensure that alongside public health measures, the rescued people are quarantined or place in facilities allowing social distancing and access to health care.

Italy must share the irregular migrant burden coming from the Mediterranean Sea, alone. There is no systematic distribution mechanism at EU level to relocate those rescued. Those rescued irregular migrants are stranded off at sea until either Italy disembarks them in its own territory or Member States reach *ad-hoc* negotiations to relocate specific groups of rescued irregular migrants as the situations arises. Alarmed by a situation whereby irregular migrants are confronted with death when stranded off at sea, IOM reiterates in its calls to the international community to adopt an alternative scheme of quick disembarkation mechanism in providing a port of safety to people intercepted and/or rescued at sea. To date, no action has been taken by Member States to adopt alternative scheme of quick disembarkation mechanism.

It cannot be accepted that a governmental decree is used as a justification to suspend or override principles of international law. This particular action cannot be accepted, as otherwise, any executive act would be used to thwart the application of international treaties or discharge state obligations under international law at any time. National governments cannot evade or bypass their obligations under international maritime, human rights and refugee law, as well as EU treaties and their constitutional laws with a simple executive act under the grounds of public security or health protection.

Considering the above legal analysis, this paper recommends that Italy should withdraw the 'Directive for the unified coordination of surveillance activities of maritime borders and fight against illegal migration according to article 11 of Legislative Decree n. 286/ 1998', alias Ministerial Circular n. 14100/ 141(8), the Directive also n. 14100/ 141(8) - issued on 15 April 2019. It is advisable that Italy in collaboration with other EU Member States to implement a coherent, human rights-based response to maritime migration from Libya. But most importantly, Italy and Europe should ensure adequate search and rescue capacity in the Mediterranean. They need

to respect and implement their international obligation to save lives at sea, while upholding the principle of *non-refoulement* under international human rights, refugee and humanitarian law.

References

Primary references

A and Others v *the United Kingdom* [GC], 2009, Application no. 3455/05.

Aksoy v *Turkey*, 1996, Application no. 21987/93.

Brannigan and McBride v *the United Kingdom*, 1993, Application nos. 14553/89 and 14554/89.

CoE, European Convention for the Protection of Human Rights and Fundamental Freedoms, as amended by Protocols Nos. 11 and 14, 4 November 1950, ETS 5

Denmark, Norway, Sweden and the Netherlands v *Greece (the "Greek case")*, Commission report, 1969.

Directive for the unified coordination of surveillance activities of maritime borders and fight against illegal immigration according to Article 11 of Legislative Decree n. 286/1998, alias Ministerial Circular n. 14100/141(8), issued in March 2019.

International Covenant on Civil and Political Rights. The Covenant was adopted by the United Nations General Assembly Resolution 2200A (XXI) of 16 December 1966

Ireland v *the United Kingdom*, 1978, Application no. 5310/71.

Lawless v *Ireland* (no. 3), 1961, Application no. 332/57.

UN General Assembly, *Protocol to Prevent, Suppress and Punish Trafficking in Persons, Especially Women and Children, Supplementing the United Nations Convention against Transnational Organized Crime*, 15 November 2000

UN General Assembly, *Universal Declaration of Human Rights*, 10 December 1948, 217 A (III)

Secondary references

Amnesty International (2015), "Libya is Full of Cruelty, Stories of Abduction, Sexual Violence and Abuse FromMigrants and Refugees" 10 May 2015, <https://www.amnesty.org/en/documents/mde19/1578/2015/en/>.

Bernardie-Tahir, Nathalie, and Camille Schmoll (2014) "Islands and undesirables: Introduction to the special issue on irregular migration in Southern European islands." 87-102.

Brachet, J. (2018). Manufacturing smugglers: From irregular to clandestine mobility in the Sahara. The ANNALS of the American Academy of Political and Social Science, 676(1).

Council of Europe, Respecting democracy, rule of law and human rights in the framework of the COVID-19 sanitary crisis, SG/Inf(2020)11, 7 April 2020.

Council of Europe, Turkey -Opinion on the Legal Framework governing Curfews, CDL-AD(2016)010.

Council of Europe,Venice Commission, CDL-AD(2006)015, Opinion on the Protection of Human Rights in Emergency Situations.

Council of Europe,Venice Commission, CDL-AD(2011)049, Opinion on the draft law on the legal regime of the state of emergency of Armenia.

ECRE (2020), Med: 150 Stranded at Sea as Malta and Italy Declare Ports "unsafe", 10 April 2020, https://ecre.org/med-150-stranded-at-sea-as-malta-and-italy-declare-ports-unsafe/.

ECtHR, Guide on Article 15 of the European Convention on Human Rights, Derogation in time of emergency, Updated on 30 April 2021, https://www.echr.coe.int/documents/Guide_Art_15_ENG.pdf.

IOM UN (2020), Libya Considers Its Ports Unsafe for the Disembarkation of Migrants. 09 April 2020, https://www.iom.int/news/libya-considers-its-ports-unsafe-disembarkation-migrants.

IOM, Missing Migrants Project, https://missingmigrants.iom.int/

Joint Communication, Mandates of the Special Rapporteur on the situation of human rights defenders; the Special Rapporteur on the independence of judges and lawyers; the Independent Expert on human rights and international solidarity; the Special Rapporteur on the human rights of migrants and the Special Rapporteur on violence against women, its causes and consequences, AL ITA 4/2019.

Kumin, Judith (2014), "The challenge of mixed migration by sea." Forced Migration Review 45

OHCHR and UNSMIL (2018), Report prepared jointly by the UN Office of the High Commissioner for Human Rights and the United Nations Support Mission in Libya on 20 December 2018 ('Desperate and Dangerous: Report on the human rights situation of migrants and refugees in Libya').

OHCHR, Joint Communication from Special Procedures, 15 May 2019, AL ITA 4/2019, https://www.statewatch.org/media/documents/news/2019/may/un-it-sr-letter-directive-sar-libya-human-rights-5-19.pdf.

The Guardian (2020), Italy declares own ports 'unsafe' to stop migrants arriving, 8 April 2020, https://www.theguardian.com/world/2020/apr/08/italy-declares-own-ports-unsafe-to-stop-migrants-disembarking.

Times of Malta (2020), Malta shuts its ports to asylum seekers, citing Covid-19 pandemic, 9 April 2020, https://timesofmalta.com/articles/view/malta-says-it-cannot-guarantee-migrant-rescues.784571.

Triandafyllidou, Anna, and Angeliki Dimitriadi (2013) "Migration management at the outposts of the European Union: The case of Italy's and Greece's borders." Griffith Law Review 22.3

Turkey-Opinion on the amendments to the Constitution adopted by the Grand National Assembly on 21 January 2017 and to be submitted to a National Referendum on 16 April 2017, CDL-AD(2017)005.

UN Committee on the Elimination of Racial Discrimination (CERD), *Consideration of reports submitted by States parties under article 9 of the Convention : concluding observations of the Committee on the Elimination of Racial Discrimination : Italy*, 4 April 2012, CERD/C/ITA/CO/16-18 , available at: https://www.refworld.org/docid/50618d9b2.html [accessed 9 November 2022]

UN General Assembly (2018), Extrajudicial, summary or arbitrary executions, A/73/314.

UN General Assembly (2018), Report of the Special Rapporteur on trafficking in persons,

UN Human Rights Committee (2019), General Comment No. 36, CCPR/C/GC/36.

Venice Commission, CDL-STD(1995)012, Emergency Powers, 1995.

ISBN: 978-2-931089-30-9

Ukraine emergency: reception in Italy of citizens fleeing war through the Institute of Temporary International Protection

Paola FOLINO*
Calabria Region - Italy

Annamaria CURCIO
Calabria Region - Italy

Raffaella CAMASTRA
Calabria Region - Italy

Abstract: Following the invasion of Ukraine by Russia, from 24 February 2022, a huge humanitarian crisis was determined as the population was forced to flee the country and was welcomed and assisted primarily by neighboring states. . At the same time, the activities necessary to guarantee the reception of people arriving in our country were also launched in Italy: by resorting to two main legislative instruments: the emergency decree, referred to in Article 77 of the Constitution, and the power to civil protection ordinance, pursuant to Legislative Decree no. 1/2018, notwithstanding any provision in force, within the limits and in the manner indicated in the resolution of the state of emergency and in compliance with the general principles of the legal system and the rules of the European Union. And in fact, following the serious international crisis that ensued, on 25 February the Italian Council of Ministers declared a state of emergency for intervention abroad, extended by a resolution of 12 May until 31 December 2022.
On February 28, the Council of Ministers approved a further state of emergency to ensure the reception in Italy of people fleeing the conflict, in order to allow effective humanitarian assistance and reception in Italy. On March 29, 2022, to deal with the emergency of the conflict in Ukraine and in implementation of the European decision 2022/382 of March 4, 2022, the Dpcm "Temporary protection measures for people coming from Ukraine as a result of ongoing war events" in order to activate the temporary protection instrument, envisaged over ten years ago by Directive 2001/55 / EC. On the basis of the EU decision, the Dpcm sets the effective date of the temporary protection from 4 March 2022.
Temporary protection is an exceptional procedure which guarantees immediate and temporary protection in cases of massive influx of displaced persons from third countries who cannot return to their country of origin, where the asylum request cannot meet. to the influx without prejudicial effects for its correct functioning, for the interests of the persons and applicants for protection. From 4 March 2022, therefore, it is possible to grant one-year residence permits that can be extended for six months plus another six, to be requested at the Police Headquarters and gives access to health care, the labor market and study.
This paper aims to examine the measures adopted by the Italian state in order to verify whether they are sufficient to provide adequate protection and oriented towards respect for human dignity and fundamental rights of the European Union.

Keywords: Ukraine emergency

Premise

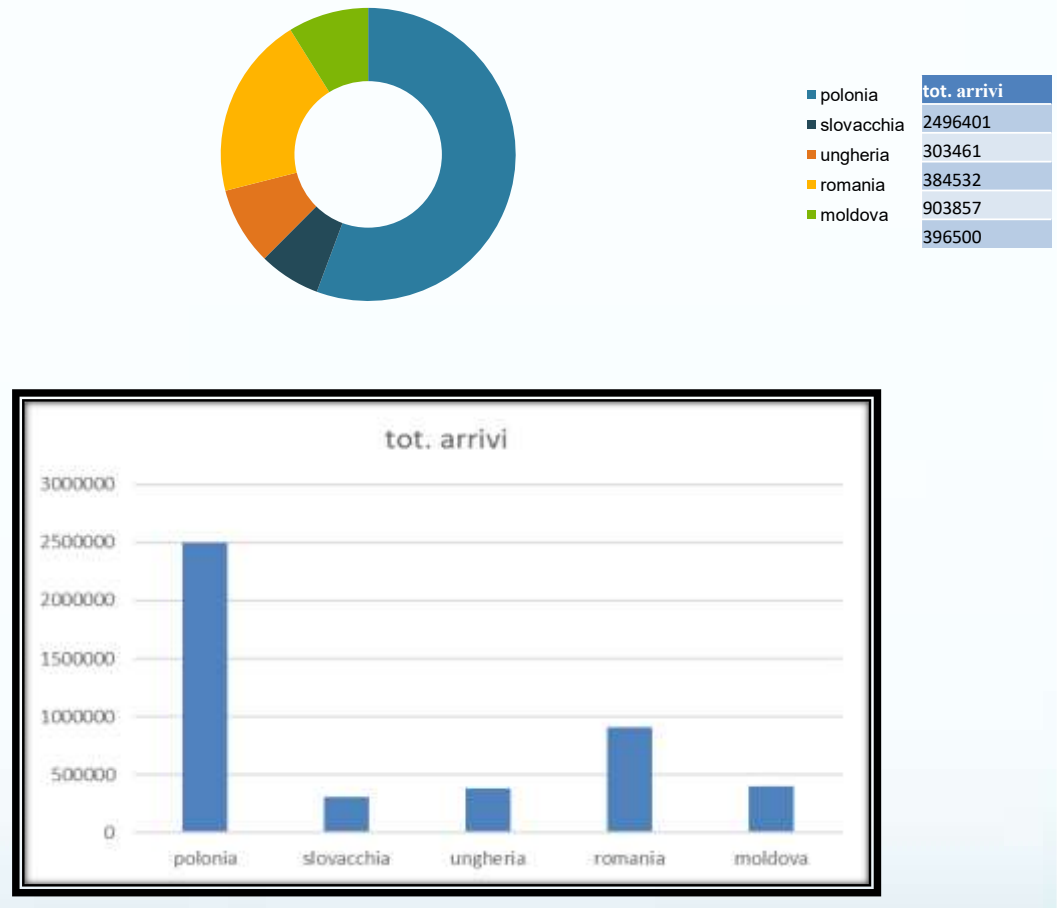
Following Russia's invasion of Ukraine on 24 February 2022, a huge humanitarian crisis arose as the population was forced to flee their country and was welcomed and assisted primarily by neighbouring states.

* Corresponding Author: paola.folino@regione.calabria.it

 ISBN: 978-2-931089-30-9

Below is a graph of the arrivals of Ukrainian refugees in the countries immediately neighbouring since the beginning of the conflict.

Arrivals in neighbouring countries



At the same time, the necessary activities have also been launched in Italy to guarantee the reception of people arriving in our country, using two main legislative instruments: the emergency decree, referred to in Article 77 of the Constitution, and the power of civil protection order, referred to in Legislative Decree no. 1/2018, notwithstanding any provision in force, within the limits and in the manner indicated in the resolution of the state of emergency and in compliance with the general principles of the legal order and the rules of the European Union.

And in fact, following the serious international crisis that ensued, on February 25 the Italian Council of Ministers declared a state of emergency for intervention abroad, extended with Resolution of May 12 until December 31, 2022.

On 28 February, the Council of Ministers approved a further state of emergency to ensure the reception in Italy of people fleeing the conflict, in order to allow effective humanitarian assistance and reception in Italy.

The following 29 March 2022, to deal with the emergency of the conflict in Ukraine and in implementation of European Decision 2022/382 of 4 March 2022, the Dpcm entitled "Temporary protection measures for persons coming from Ukraine as a result of the ongoing war events" was issued in order to activate the instrument of temporary protection, provided for over ten years ago by Directive 2001/55 / EC.

On the basis of the EU decision, the Dpcm has set the effective date of temporary protection starting from 4 March 2022.

There are three forms of protection: refugee status, subsidiary protection and temporary protection.

Temporary protection is an exceptional procedure which guarantees, in cases of mass influx of displaced persons from third countries who cannot return to their country of origin, immediate and temporary protection, where the asylum application cannot cope with the influx without prejudicial effects on its proper functioning and on the interests of persons and applicants for protection.

From 4 March 2022, therefore, it is possible to grant one-year residence permits that can be extended for six months plus another six, to be requested at the Police Headquarters and gives access to health care, the labor market and study.

The purpose of this paper is to examine the measures adopted in order to verify whether they are sufficient to provide adequate protection and oriented to respect for human dignity and fundamental rights of the European Union.

1. How the institution of temporary protection was born

In 2001, mindful of the conflicts in the former Yugoslavia and Kosovo, the European Community adopted Directive 2001/55/EC, an instrument aimed at managing situations of very large and close arrivals of displaced persons: the purpose of the Directive is to "establish minimum standards for granting temporary protection in the event of a mass influx of displaced persons and take measures to ensure a balance of efforts between Member States receiving such persons and bearing the consequences of their reception". This tool - which had never been activated first, although in recent years Europe has been the subject of significant forced migratory flows as a result of international crises (think of the cases of Libya, Syria and Afghanistan) - it is now used by the Union and its Member States to deal with the flow of refugees from Ukraine and to provide them with adequate and immediate protection. Precisely because it is an instrument imagined more than 20 years or are and have never been updated or implemented, poses challenges of harmonization with existing legislation both in Europe (especially with regard to international protection) and Italian.

In Italy, this directive has been implemented with d.lgs. 85/2003; In particular, Articles. Articles 3 and 4 provide that temporary protection measures are decided by decree of the President of the Council of Ministers, which establishes the date of effective date of protection, the categories of displaced persons, the procedures for issuing visas and residence permits, the assistance measures and procedures to be implemented in the event of an application for asylum by a person enjoying temporary protection.

The activation of temporary protection is conditional on the fact that the EU Council, on a proposal from the Commission, ascertains, by decision adopted by qualified majority, the existence of a mass influx of displaced persons (Article 5 paragraph 1 of the Directive). The decision determines the activation of temporary protection for a defined period, in all Member States. It is therefore an instrument of European solidarity that has effects erga omnes, i.e. binding on all EU Member States[1]. It follows that temporary protection, where activated, applies to all States of the Union, regardless of whether or not the latter have unanimously approved its activation. [2]. Each Member State is then required to implement the Decision with the instruments of national law with which it has adopted it; for Italy it is the Decree of the President of

[1] Cfr. art. 5 co. 3 of the Directive.

[2] It should be noted that, even in the absence of measures by the EU Council, Italy still has the right to independently activate internal temporary protection measures, pursuant to art. 20 of Legislative Decree no. 286 of 1998. Also in this case, they are adopted by decree of the President of the Council of Ministers, in agreement with the Ministers of Foreign Affairs, the Interior, for Social Solidarity and with the other Ministers who may be interested. This is what the Italian Government did in April 2011, activating humanitarian measures of temporary protection

the Council of Ministers (DPCM) according to the provisions of art. 20 of Legislative Decree. 286/98 (Consolidated Law on Immigration) and art. 3 of Legislative Decree. 7 April 2003, n. 85, which is an internal standard transposing Directive 2001/55 / EC.

2. Application of the institution of temporary

In general, the Directive provides that temporary protection is activated against nationals of the country from which a mass flight occurs, as well as third-country nationals or stateless persons who have had to leave their country "or region" of origin or who have been evacuated, in particular in response to the appeal of international organizations, and whose repatriation in safe and stable conditions is impossible because of the situation in the country itself.

The Directive specifies that, provided that these criteria are met, this protection also applies to refugees under the Geneva Convention and to persons protected under other national or international legislation conferring international protection, and in particular:
a) people who have fled areas of armed conflict or endemic violence;
b) persons who are at serious risk of systematic or generalised human rights violations or who have been victims of such violations [3]. Specifically, the categories of persons to whom temporary protection is to be applied are explicitly indicated in the decision by which the EU Council activates the protection. The Directive also allows Member States to decide, individually or collectively, to grant temporary protection to additional categories of displaced persons and, if they have fled for the same reasons and from the same country or region of origin[4]. Art. 2 of the recent Decision no. 382 of the Council of the European Union and art. 1 of the Prime Ministerial Decree of 28.3.2022 established that temporary protection applies:

a) Ukrainian citizens residing in Ukraine before 24 February 2022;
b) third-country nationals or stateless persons who were enjoying international protection or equivalent national protection in Ukraine before 24 February 2022;
c) to the members of the family of the persons referred to in points (a) and (b):
   - or spouse;
   - or stable partner, where the legislation or practice of the Member State concerned treats unmarried couples and married couples under the law on aliens;
   - or minor children (legitimate, natural or adopted), unmarried, of the applicant or spouse; it is doubtful whether the minor children of unmarried couples are also taken into account, but it is clear that such exclusion would entail unlawful discrimination;
   - or other relatives identified in reference to art. 29, co. 1 lett. c) and d) TUI, i.e. totally disabled dependent adult children, dependent parents or over sixty-five, who lived together in Ukraine and depended totally or partially on the applicant for reunification during that period.

Finally, the Council Decision provides that temporary protection shall also apply to:

d) third-country nationals or stateless persons who can prove that they were legally resident in Ukraine before 24 February 2022, on the basis of a valid permanent residence permit,

to be ensured in the territory of the State in favor of citizens belonging to North African countries who have flowed into the national territory.

[3] Cfr. art. 2 lett. c) of the Directive. In this regard, it is recalled that the birth of the institution of subsidiary protection is subsequent to that of temporary protection.

[4] In this case, however, those Member States and with regard to those additional categories do not apply to the provisions of solidarity between Member States provided for in Articles. 24, 25 and 26 of this Directive, cf. art. 5 co. 2. It is hardly necessary to note that, although the European legislature considered stressing, in recital 16, that Member States must treat persons with temporary protection in a way that prevents and avoids discrimination, the principle of non-discrimination is not indicated among the key ones underlying the choice of categories of displaced persons to whom protection is granted.

issued in accordance with Ukrainian law and who cannot return safely and stably to their country or region of origin.

With the Prime Ministerial Decree of 28 March 2022, the Italian Government decided not to recognize temporary protection to two other categories of people, with regard to whom the EU Council Decision left the Member States the mere right to recognize it, namely:

- stateless persons and third-country nationals other than Ukraine who are legally residing in Ukraine before 24 February 2022 on the basis of a valid non-permanent residence permit, issued in accordance with Ukrainian law and who cannot return safely and stably to their country or region of origin.
- persons who fled Ukraine not long before 24 February 2022 with heightened tensions or who were on Union territory (e.g. on holiday or for business purposes) close to that date and who, due to armed conflict, cannot return to Ukraine.

Therefore, Italy does not grant temporary protection to these persons, without prejudice to the other possibilities provided by the law to obtain other forms of protection.

Many Member States have allowed entry into the national territory to persons belonging to other categories from Ukraine also in consideration of the provisions of art. 6 par. 5 letter c) of the Schengen Borders Code.

3. Duration of temporary protection

According to the Directive, the duration of temporary protection is a maximum of one year from the day on which it is activated by the Council. This period can be reduced at any time, and therefore the protection could cease, in the event that the Council itself decides to do so, but also extended, on an ordinary basis, by one year (in two tranches of 6 months each) and, extraordinarily, by a further year, at the request of the Commission.

The termination shall be subject to an assessment by the Council as to whether there is a situation in the country of origin which allows the safe and stable return of persons granted temporary protection, with due regard for human rights and fundamental freedoms, as well as the obligations of the Member States with regard to non-refoulement.[5]. In the specific form of Decision 2022/382, the Council established that temporary protection for persons displaced from Ukraine after 24 February 2022 starts on 4 March 2022.

The Council has not foreseen a date for the end of the protection itself and therefore the duration is considered to be at least one year from the start date [6].

Given the absence of visa requirements for entry into the states of the European Union, displaced Ukrainians have the right to settle in the country of their choice. A similar right is not expressly provided for other persons displaced from Ukraine but it is reasonable to assume that it applies to all, given that the emergency of the war would not allow the issuance of visas to anyone.

Although a mechanism for the redistribution of Ukrainian refugees between EU Member States has been envisaged, the Commission and the Council of the European Union have agreed that, for the time being, the most efficient burden-sharing strategy is to allow the spontaneous transit of displaced persons to Ukrainian communities already present in the Member States. This is in fact allowing fleeing Ukrainian citizens to cross the territory of the Union to reach the Member State of their choice to settle there, and then apply to the latter for temporary protection and the issue of the relevant residence permit.

[5]On this point, it is significant that the Council's assessment must refer not only to the persistence of the conditions that gave rise to the activation of temporary protection, but to the wider range of situations arising from the obligation of non-refoulement.

[6]These terms are inevitably taken up and confirmed by the Italian executive in art. 1 co. 1 of the Prime Ministerial Decree.

 ISBN: 978-2-931089-30-9

4. Situation in Italy

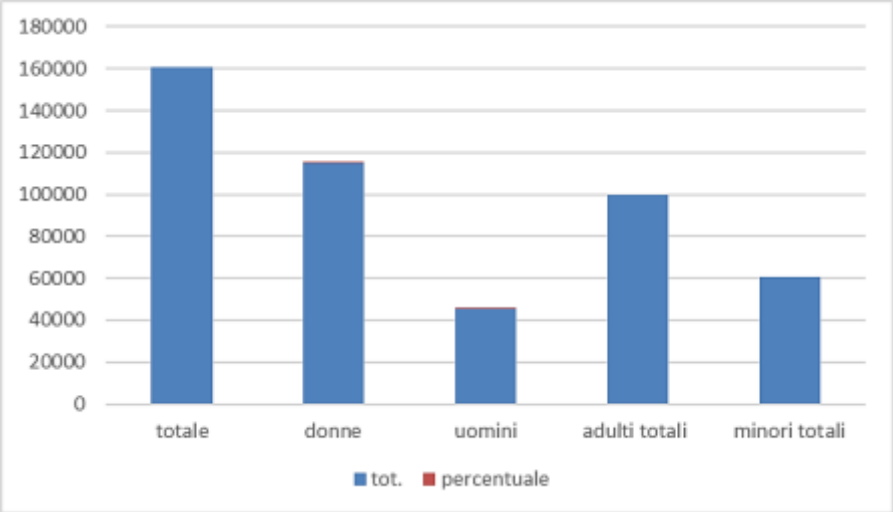
The Ministry of Foreign Affairs and International Cooperation, by decree of 9 March 2022, suspended Ukraine from 12 March 2022 to 31 December 2022 from the list of safe countries of origin.

More than 160,000 people fleeing the conflict in Ukraine have arrived in Italy to date, the destination cities declared upon entry into Italy continue to be Milan, Rome, Naples and Bologna.

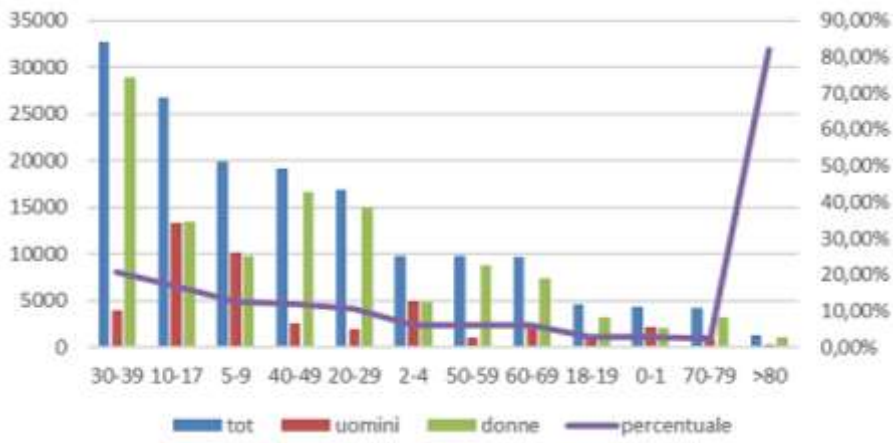
Through the dashboard, which uses data provided by the Ministry of the Interior, it is possible to consult the total number of people who have applied for temporary protection, the breakdown by age group and the distribution of applications on a regional and provincial basis.

Persons seeking temporary protection as of 14/10/2022 in Italy:

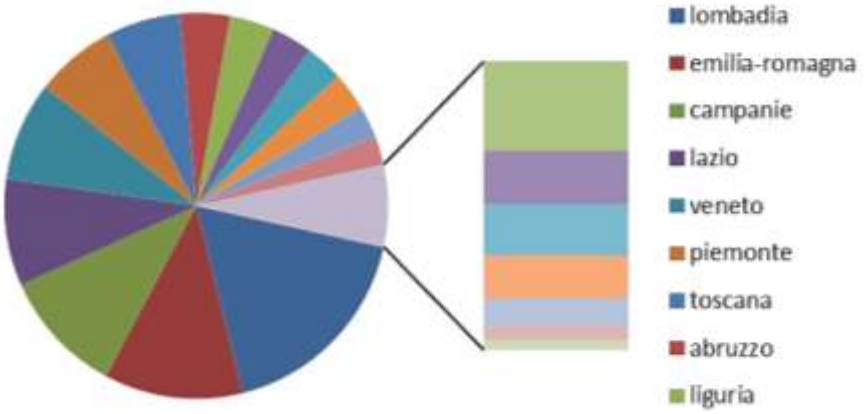
	tot.
Women	115229
Men	45444
Total Adults	99788
Lower Totals	60885
TOTAL	160673

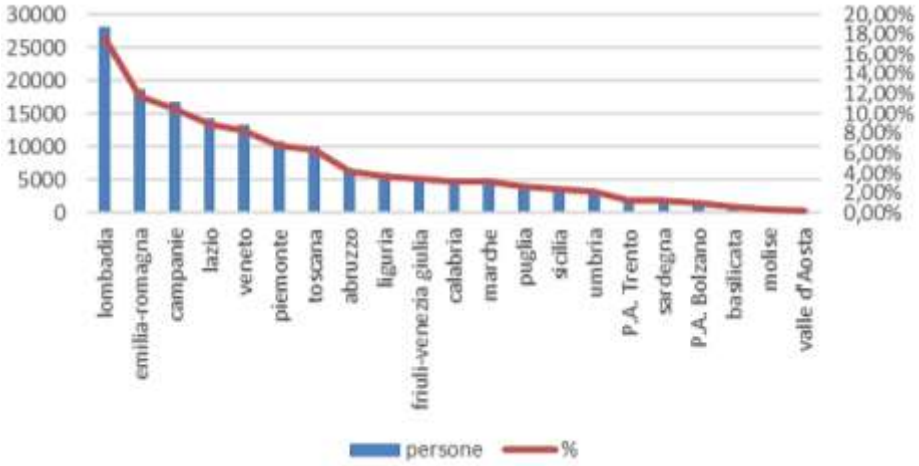


Age Groups

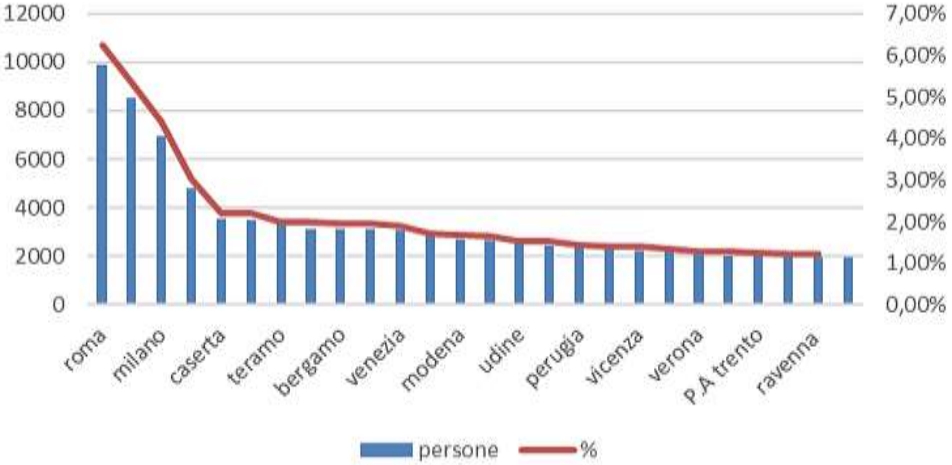


Persons with temporary protection distributed by region





Persons with temporary protection distributed by province



Conclusions.

The United Nations High Commissioner for Refugees (UNHCR), in view of what has happened in Ukraine since the outbreak of the conflict, has called on all countries to allow civilians fleeing indiscriminate access to their territories, also respecting the principle of non-refoulement. Undoubtedly, in this context, the decision to activate temporary protection for those fleeing the war in Ukraine is to be welcomed.

Directive 2001/55 was adopted in the aftermath of the war in the former Yugoslavia precisely to cope with huge inflows that could compromise the stability of the asylum and reception system of the Member States in emergency situations such as forced migration caused by wars, generalized violence or systematic violations of human rights.

The current conflict in Ukraine falls squarely within the scope of the Directive, and the EU institutions have been able to overcome the divergent positions that had prevented, in the past (and in the present), reaching an agreement on its activation.

There are, however, critical points of Decision 2022/382.

In particular, the latter creates a kind of stratification of access to protection through categories of applicants who are certainly admitted to the exercise of temporary protection, those whose protection depends on the discretion of the Member States and, finally, those who will in all likelihood be excluded from the purpose of applying the Decision.

In fact, art. Article 2(4) provides a flexible but at the same time narrow definition of "family members", which includes the spouse or stable partner if the legislation or practice of the Member State of destination treats unmarried couples and married couples within the framework of the law on aliens; minor children of the beneficiary of protection or spouse; other close relatives who lived together as part of the household before 24 February 2022 and who were wholly or partially dependent on the beneficiary during that period.

Clearly, the definition does not include the minor children of the partner or any other family member who did not live with the beneficiary of temporary protection and who was not at least partially dependent on it.

Another eligible category of protection under the Decision is third-country nationals or stateless persons who were legally resident in Ukraine before 24 February 2022 on the basis of a permanent residence permit and who cannot return safely and permanently to their country or region of origin (Art. 1(2)). Unlike the beneficiaries referred to in paragraph 1, Member States may provide this category with temporary protection or, alternatively, another standard of "adequate protection" on the basis of national law. National protection on humanitarian or charitable grounds, provided for in the legal system of as many as 25 Member States, it is also susceptible to radical and sudden changes or even to abolition from the legal system.

In Italy, humanitarian protection was abolished in 2018 and special protection and permits for special cases were introduced; in Sweden, it remained suspended from 2016 to July 2021 following the so-called "refugee crisis"; in the Netherlands, it was abolished in January 2019.

It is therefore a question of understanding whether the "adequate protection" to which the Decision refers must be equivalent, in terms of rights and guarantees offered, to the temporary protection in question.

Moreover, it would appear that family members of foreigners with permanent residence permits are excluded from temporary protection: elements of different treatment and access to protection therefore seem to be already emerging within the category to which greater guarantees of protection are offered.

Art. Article 2(3) of Decision 2022/382 outlines a second group of persons who, unlike the first, can only "hope" to be included in the pool of beneficiaries of protection, or additional categories of displaced persons, if they come from the same geographical area and have fled for the same reasons.

Therefore, the Council provides for the possibility for Member States to admit other persons to temporary protection at their discretion, for example those who were legally resident in Ukraine with a residence permit other than the permanent one and their family members, as defined in art. 2, paragraph 4, who cannot return in safe and stable conditions to their country or region of origin.

For example, third-country nationals who were in Ukraine for study or work purposes who should nevertheless be eligible for protection on humanitarian grounds without requiring them,

in particular, to be in possession of a valid visa, sufficient means of subsistence or valid travel documents, in order to guarantee them safe passage in order to return to their country or region of origin.

The Council also invites to consider persons who fled Ukraine not long before 24 February 2022 or who were on EU territory, for example, on holiday or for work purposes close to that date: protection (temporary or national) for this second category of persons is entirely left to the discretion of individual Member States which, Therefore, they will be able to decide for themselves whether to provide them with protection and, if so, what status to grant.

Finally, there is the third category of people who, although victims of the conflict and fleeing Ukraine just like the first two categories outlined, will most likely be excluded from temporary protection. The latter group includes third-country nationals or stateless persons irregularly present in Ukraine.

In this regard, it is essential to remember that, according to the latest available data, the number of irregulars present in Ukraine in 2019 ranged between 30 and 61 thousand, mainly from former Soviet countries, while applicants for international protection were about 2,300. The main countries of The latter were Afghanistan (882), Syria (491), member states of the Commonwealth of Independent States (220) and the Russian Federation (165).

In conclusion, people likely to be excluded from temporary protection are paradoxically among the most vulnerable people in greatest need of protection.

People who come from countries with serious limitations and violations of human rights, countries torn apart by latent conflicts and from Russia itself which, in the absence of documents or a regular or stable position in Ukraine, risk being abandoned and forgotten by the institutions, exposing them seriously to the risk of exploitation, trafficking and trafficking, inhuman and degrading treatment.

Furthermore, this exclusion is not permissible from the point of view of international refugee law, since protection must be granted without any kind of discrimination or distinction on ethnic, national or legal basis.

On the contrary, the Council Decision seems to create a dangerous stratification between people who, although united by the horrors of war, are destined to receive different treatment depending on their condition on Ukrainian territory.

In these dramatic circumstances, access to or lack of access to a form of protection can determine the lives and future of people fleeing, can alleviate or exacerbate the traumas of war as well as the vulnerabilities they bring.

It is therefore hoped that the protection granted to Ukrainian refugees will be applied to the fullest extent without distinction on grounds of their status.

ISBN: 978-2-931089-30-9

Irregular immigration and Depopulation: a solution to repopulate the "Ghost Towns

Eveny CIURLEO*
Freelance - Italy

Ilaria ZAFFERANO
Freelance - Italy

Abstract: Irregular immigration and depopulation are two economic-demographic phenomena that often tend to represent a threat to the territory; from this arises the need for a strategy that could create a univocal solution, aimed at resolving both issues, that is to favor the integration of immigrants within the so-called "Ghost Towns", allowing them to be repopulated and guaranteeing consequently the economic development not only of the countries themselves but also at the national and European level if applied to several realities. The purpose of this model is to reveal how the Gosht Towns would be repopulated if part of the structured funds disbursed by the European Union were destined for their restructuring, creating real inhabited centers within which immigrants can regulate themselves and integrate for a long-time term. We will start from the analysis of a micro-reality characterized by high levels of depopulation, it will be demonstrated with an economic model that as regular immigration increases, depopulation can be reduced and after the establishment of the strategy, the numerical demonstrations of the expected results will be reported. which may in the future be applied to even larger realities, but with the same characteristics. We want to demonstrate in detail how from the comparison between the actual demographic indicators and the hypothetical ones (those that would be after the application of the model) an increase in the rate of variation of the territory will emerge and there will be an increase in the immigration quotient and a positive migratory balance determined by the regularization of immigrants who will, in turn, contribute to obtaining a positive balance between tax revenue and public spending since having regular immigrants is a positive thing, even for the state coffers. For the creation of the model object of this article, research will be carried out (including empirical ones), statistical-demographic forecasts, and economic and mathematical models that will demonstrate the truthfulness of the expected results or any repercussions.

Keywords: Immigration, Depopulation, Ghost Towns

1. Research background

Irregular immigration and depopulation are two economic-demographic phenomena that tend to often pose a threat to the territory; from this, the need for a strategy that aims at a unique solution to both issues arises. Through the integration of immigrants in the so-called 'Ghost Countries', in fact, a repopulation of now abandoned spaces would be allowed by restoring and thereby initiating a renewed economic development - not only of the countries themselves- but of the national and European territory, if applied to more realities. To build the model and follow a correct methodology, it is necessary to individually describe the two phenomena (immigration and depopulation), contextualized to the micro-actuals that will be analyzed and then in

* Corresponding Author: eveny.ciurleo93@libero.it

the future we can apply it to more vast and dynamic realities. For a nation characterized by a considerable migratory flow, immigrants who are placed in the world of work on a regular basis, including through permanent contracts, would be an important element of development within the population. Such integration, in fact, would result in tax revenue destined to enter the coffers of the state, all the higher than the public expenditure that the Italian government establishes for the acceptance of foreigners. In Italy in 2021, the balance between tax revenue and public spending for immigrants is 4 billion euros, that is, the Italian government earns 4 billion euros for the presence of a production structure in which immigrants are placed, having regular immigrants is a good thing, even for the coffers of the state.

Studying the phenomenon of immigration in a small reality such as Locride, of the year 2021 and the first half of 2022, about 7000 irregular immigrants enter the year within the territory. In fact, there were 55 landings in 2021 and 27 until June 2022. This category of immigrants is a considerable cost, to be addressed through measures that allow them to integrate, and at the same time offer the host territory the opportunity to benefit; a not a simple undertaking, given the unemployment rate recorded in Locride, which amounts to about 40% in recent years. Let us now resolve our analysis on the issue of depopulation. The latter phenomenon has a negative impact on the environment, the economy and culture. Calabria is increasingly at risk of depopulation, in fact in 2021, thirty-three thousand fewer residents were recorded, depopulation dictated by the impossibility of not being able to find a job in accordance with the studies carried out especially by the youngest. An age group between the ages of 23-35, addresses their job application to Northern Italy, if not abroad. Without a political maneuver to brake this social phenomenon, we will see a worsening of demographic indicators such as the birth rate, and a lack of generational change in the labor market.

The starting point of the following research, however, focusses on the depopulation of some countries of Calabrian territory, the so-called Ghost Town, or entire cities or parts of them, which have been abandoned in times past for various reasons, including natural disasters such as earthquakes and floods and never again repopulated. These territories have a territory favorable to agriculture as well as a considerable tourist attraction. Among the many abandoned cities in Calabria, it was chosen to analyze the ancient village of Panduri, located in the hills, in the current municipality of Careri (in the province of Reggio Calabria), destroyed following an earthquake in 1507. Of this town, only the ancient walls of the convent and numerous legends remain. Following the destruction of Panduri, on a nearby hill, a new settlement was born: the country today called Careri, but also a country at risk of depopulation.

2. The Survey: research questions and data reprocessing

The aim of the project is to demonstrate how to repopulate the Ghost Towns, hypothetically drawing on part of the structured funds, disbursed by the European Union. The funds would be allocated to the economic restructuring of inhabited centers in which immigrants can regularize and integrate in the long term, following the example of the Riace model, albeit free from all political senses. The objective is to analyze the phenomenon of immigration in the Locride, hypothesizing what the economic and demographic indicators could be like today, if this model were applied and if the immigrants landed in the Locride in the last year, contributed to the repopulation of Panduri, a young consequence to the economy of the whole of Calabria. Such an intervention is expected to facilitate the integration of immigrants on the one hand, and on the other hand, would lead to a maneuver against depopulation. Both factors, which can lead to the growth of the economy of the entire region given the high number of ghost towns in Calabria and the multiple landings that are taking place more and more frequently.

3. The statistical model

For the realization of the project and the creation of the economic model, research - including empirical - statistical-demographical forecasts, economic and mathematical models were carried out. From field research, it has emerged that this territory is particularly vast and above all has a land suitable for agriculture and pastoralism, also considering the mild climate of Southern Italy. From the hectares on which Careri extends, making a country with about 6500 inhabitants, which can have a population density 405,03 ab / km ^ 2, in, there is about 82% of the territory to be filled in terms of inhabitants. If we imagine a negatively inclined curve within a Cartesian plane where we indicate immigrants on the axis of the axes and depopulation on the axis of immigrants, we can see how as immigration increases depopulation is reduced (and vice versa) and the more we move from the origin the data improves.

On the other hand, we have a constraint (represented by a straight tangent to the curve) within which you cannot go, and this represents the current missing possibility of entering immigrants and regularizing them. To move this constraint to the right, strategies have been designed, which reside in the Structural Funds. Foreign nationals who have entered Italy irregularly are housed in centers where, if they require international protection, they are welcomed for the time necessary for the procedures for ascertaining the relevant requirements. So, these immigrants, within a reception center, are not put in a position to benefit the nation but determine a cost; by offering them food but not money, and not putting them in such conditions that they can integrate and build a future, they will not be able to contribute to the increase of the state coffers and will only disadvantage the host countries. To implement the strategy, and to apply such a model, already applied in the municipality of Riace, one could start from the Structural Funds. The European Structural and Investment Funds are the financial instruments of the European Union's regional policy, the aim of which is to equalize the different levels of development between regions and between Member States with a view to economic, social, and territorial cohesion. There are five of these funds:

-The European Regional Development Fund
-The European Social Fund
-The cohesion fund
-The European Maritime and Fisheries Fund
-The European Agricultural Fund for Rural Development

For the 2021-2027 programming cycle, the Fund has been refinanced for EUR 73.5 billion. As most repopulated ghost towns have been mentioned above, they have land prepared for agriculture and the first step of our strategy is to allocate part of the European Agricultural Fund for Rural Development to the start of agricultural activities to create labor, as well as to allocate part of the funds to the revaluation of urban spaces suitable for people and tourists. Through the proper use of regional development funds, we can think of housing structures that will prove to be real investments over time. Repopulating these places by allocating illegal immigrants to them (following the right process of bureaucratic regularization) can only bring benefits and would allow both the long-term integration of immigrants, would give them the tools for leading a decent life and would reciprocate the host country demographic increase in terms of population, generational change on the labor market and more jobs also for residents factors which are factors that in the long run contribute positively to both regional, national and therefore European statistics.

4. Result's discussion

Analyzing from an algebraic point of view, as has been hypothesized so far in theory, there is such a correspondence, to the point of being able to build future prospects as well.

As previously hypothesized, it has been verified numerically, how it is possible to encounter two extremely relevant problems for a society such as: irregular immigration and depopulation.

The research was carried out by analyzing a small reality and from the results obtained it is evident that the model can hold up in all those places that have the same assumptions.

Careri, a Calabrian town has a population of 2145 inhabitants in 2021 and a population of 2129 in 2022.

In 2021 he counted 55 immigrants and in 2022, 54 (including 26 males and 27 females).

From these data it was possible to calculate the immigration quotient which turns out to be almost identical over the period under observation, in fact it amounts to 2.53% for 2021 and 2.54% for 2022.

The speed of population growth has therefore remained almost unchanged, but to understand the effectiveness of the model we must assume that the strategy is being put in place.

If we consider that in 1500 the same number of people who currently reside in Careri emigrated from Panduri in 1500, we can consider that about 2000 people could be contained in that space and cope with the number of inhabitants present in the municipality of Careri.

If we consider that of the approximately 7000 irregular immigrants landed in Locride in 2021 and of the approximately 3,000 landed in the first half of 2022 a good percentage could have resided in those areas, what would be the numbers today?

Let's assume that in 2021 1550 immigrants were as previously analyzed, if immigrants were regularized after the landings, this would counteract the depopulation we would therefore have a greater number of members and fewer deletions. These positive effects within this micro area would clearly have a significant impact on the entire province or region, clearly if the model were applied within all ghost towns. If we consider that in Calabria, only in the province of RC there are many such as Pentadactlo, Roghudi Nicastrello and Africo Vecchio, it is immediate to understand that the impact would be such as to bring demographic growth (as demonstrated by the indicators) but also economic growth, we know in fact that the ability of a country to create wealth also depends on its demographic regularized and in 2022, 1750. The migratory quotient - considering that the average population generates emigrants but has nothing to do with immigrants-, would have gone from 72% to 84%.

The migratory balance, given by the difference between immigrants and emigrants, would consequently be positive and would tend to increase more and more, highlighting dynamism, vitality, and power of attraction on the part of the territory being analyzed. Also, the speed of population growth. Obviously, this would consequently lead to an increase in the population, in fact

5. Conclusion

Therefore, dedicating part of the structural funds to creating real environments suitable for giving immigrants a future, would turn into a successful investment in the medium to long term that would lead to solving or at least reducing the problem of depopulation but also that of immigration. which are two factors that influence the economy of the whole country in an extremely significant way.

References

Anna Maria Altavilla, Francesca Galizia, Angelo Mazza (2012) – *Indicatori di carico demografico ed invecchiamento della popolazione – Rivista Italiana di Economia, Demografia e Statistica.*

Stefano Baldi, Raimondo Cagiano De Azevedo (2005) – *La Popolazione Italiana, storia demografica dal dopoguerra ad oggi – Il Mulino.*

Gian Carlo Blangiardo (1992) – *Elementi di demografia – Il Mulino.*

Marco Centra, Massimiliano Deidda (2012) – *Quadro demografico e sostenibilità macroeconomica in Europa e in Italia – Osservatorio ISFOL, Rivista trimestrale n° 2/2012.*

Sergio Cesaratto (2009) – *Invecchiamento della popolazione, mercato del lavoro e welfare: un'introduzione critica – Studi e Note di Economia, Anno XIV, n. 3- 2009.*

Giovanna Da Molin, Fabrizia Fiore, Pietro Iaquinta, Elita Sabella (2013) – *Il turnover di popolazione disponibile al lavoro.*

Pietro Iaquinta (2005) – *Implicazioni demografiche sull'evoluzione del mercato del lavoro in provincia di Bari – Atti del convegno: Ambiente, salute e qualità della vita del 30/11/2005.*

Pietro Iaquinta, Roberta Saladino (2011) – *Demografia della forza lavoro – Rivista Italiana di Economia Demografia e Statistica, Gennaio-Marzo 2011.*

ISTAT (2022) – *La Popolazione Straniera Residente in Italia, 01/01/2022 – Comunicato stampa Settembre 2022.*

ISTAT (2022) – *Natalità e Fecondità della Popolazione Residente 2021 – Comunicato stampa Novembre 2022.*

ISTAT (2021) – *Il Censimento della Popolazione Straniera – Dicembre 2022.*

ISTAT (2013) – *Bilancio Demografico Nazionale: Popolazione residente, natalità, mortalità, migrazioni, famiglie e convivenze 2012 – Comunicato stampa del 25/06/2013.*

Carlo De Rose (2000) – *L'Analisi del Territorio nella Programmazione degli Interventi di Sviluppo Agricolo – I Quaderni POM – INEA.*

Manuela Stranges (2007) – *L'invecchiamento demografico in Italia: verso un miglioramento della relazione tra età e lavoro – Quaderni Europei sul nuovo Welfare, N. 7, Febbraio 2007, 102-118.*

Vito Teti (2004) – *Il senso dei luoghi – Donzelli Editore, 2004.*

Maurizio Zenezini (2009) – *Invecchiamento della popolazione, crescita, occupazione – Studi e Note di Economia, Anno XIV, n. 3-2009.*

ISBN: 978-2-931089-30-9

Population approach towards Covid-19 vaccination: the Albanian experience

Eftiola POJANI*
Faculty of Pharmacy, Catholic University "Our Lady of Good Counsel", Tirana - Albania

Abstract: Coronavirus disease (COVID-19), an infectious disease caused by the SARS-CoV-2 virus, affected many live dimensions of people all over the world. So far, there have been reported 6,517,123 deaths worldwide, of which 2,092,151 in Europe. Covid-19 rumors and misinformation have accompanied immunization campaigns in many countries. Due to these reasons, Albania faced vaccine resistance too, especially among young people. Although the WHO states that the end of the pandemic is in sight, the fight against Covid-19 is not over yet and is still globally required the highest vaccination coverage among elders and patients with chronic diseases. The purpose of this study was to evaluate the vaccination situation in Albania and identify the potential factors that may have led the Albanian population to a lower approach towards Covid-19 vaccination compared to the other countries in the region.
This paper is a review of the current knowledge related to the vaccination status in Albania, and the strategies implemented at the territorial level.
According to the Ministry of Health and Social Protection, Albania has so far recorded 3,589 deaths due to Covid-19. The vaccination process in Albania is ongoing and 1,265,283 individuals have been vaccinated with the second dose up to now, and the goal set for 2022-2024 is to reach 80% of vaccination coverage. Despite the difficulties experienced in vaccine procurement, Albania managed to provide them continuously and so far, 5 million doses of anti-COVID vaccines have been made available to the population. To improve the access of the Albanian population toward vaccination, like in other countries in the region such as Italy (79,65% fully vaccinated with the last dose of primary series) Greece (72,12%) or Turkey (63,91%), cooperation with all the factors and actors involved in the process, is required.
The national action plan against Covid-19 in Albania was primarily focused on interrupting the transmission of the infection and preserving maximum health capacities by identifying the priority groups for vaccination, followed by its availability for all age groups. Regardless of the undertaken measures, there is still hesitancy noticed among young people towards vaccination, which impacts the health and wealth of the population directly. Targeted adequate information and addressing misinformation are necessary tools to increase overall national vaccination adherence and tackle vaccine hesitancy.

Keywords: Covid-19 vaccines, Albania, Institute of Public Health, WHO, hesitancy, vaccination coverage, Ministry of Health and Social Protection.

1. Introduction

Coronavirus disease (Covid-19) is an infectious respiratory disease caused by SARS-CoV-2 (ECDC, 2022). This novel coronavirus has been detected for the first time in China in December

* Corresponding Author: e.pojani@unizkm.al

2019, and throughout its rapid diffusion all over the world, it is considered one of the most harmful health crises since the global outbreak of Pandemic Influenza (Flu) in 1918 (CDC, 2018). Covid-19 affected many live dimensions of people all over the world, not only in the health aspect but also for its severe impact on the socio-economic aspect. Regardless of this, people learned to distance themselves, protect themselves and vaccinate, as the only efficient tools available to deal with the Covid-19 pandemic.

So far, there have been reported 6,517,123 deaths worldwide, of which 2,092,151 are in Europe (WHO, 2022). According to recent data from ECDC, 83,4% of the EU adult population have completed the primary vaccination series (European Commission, 2022). Although the WHO states that the end of the pandemic is in sight, the fight against Covid-19 is not over yet and is still globally required the highest vaccination coverage among elders and patients with chronic diseases. Thus, supporting all countries to reach high levels of vaccination coverage remains the key point of interest for WHO (WHO, 2022). Despite the undertaken policies regarding pandemic management, people's beliefs, attitudes and behavior are considered fundamental factors that directly influence on Covid-19 vaccination coverage.

The fear of being infected, standing up to a new infectious disease outbreak even psychologically, and especially the spread of Covid-19 rumors, were among the most challenging problems that each country had to face. The explosive growth of misinformation and disinformation about the COVID-19 vaccines is capable of inducing vaccine hesitancy among the population, directly obstructing the effort to reach the required high levels of population immunity in terms of vaccine coverage (Lee et al., 2022; Broniatowski et al., 2020; Dubé et al., 2013). The circulation of unverified news has accompanied immunization campaigns in many countries. Due to the above reason, Albania faced vaccine resistance too, especially among young people.

The first cases of COVID-19 in Albania were confirmed on March 8, 2020 (https://shendetesia.gov.al/wp-content/uploads/2021/02/4-SHQIP.pdf). Albania is located in the southwestern region of the Balkan Peninsula (https://2009-2017.state.gov/outofdate/bgn/albania/100040.htm) and according to the World Bank income level classification data, Albania is categorized as an upper middle-income economy (The World Bank, 2021). According to the national immunization program, the goal set for 2022-2024 is to reach 80% of vaccination coverage. Considering the government's effort to quickly provide vaccines for Albania, also considering the intellectual investment of scientists for the development of Covid-19 vaccines in a relatively short time, the conversion of currently available vaccine doses into vaccinations remains one of the challenges to completing this chain. In this context, the provision of healthy information by professionals in the first place and especially by social media platforms, is a priority.

The objective of this study is to demonstrate the current vaccination status in Albania, and the strategies implemented at the national level. This study aims also to evaluate the impact of social media on national immunization coverage.

2. Methods

This paper is a descriptive review of the current knowledge related to the vaccination status in Albania, and the strategies implemented at the territorial level. In order to provide an overall picture of the topic, it was performed a literature review. There were identified 22 national and international conducted studies to assess the impact of misinformation on people's personal judgment regarding vaccination issue. The selected databases were as follows: PubMed, MEDLINE, WHO, ECDC. In addition, the keywords and phrases used to generate this research were: Covid-19 vaccines, Albania, Institute of Public Health, WHO, hesitancy, vaccination coverage, Ministry of Health and Social Protection.

3. Results and Discussion

The strategies implemented at the national level to deal with the covid-19 pandemic, have started with the establishment of the National Task Force and the Technical Committee of Experts. There was also drawn up a national Covid-19 vaccination strategy, which was necessary in order to have a vaccination process according to international recommendations (https://shendetesia.gov.al/wp-content/uploads/2021/02/4-SHQIP.pdf.)

According to the Ministry of Health and Social Protection, Albania has so far recorded 3,589 deaths due to Covid-19 (https://shendetesia.gov.al/). The vaccination process in Albania is ongoing and 1,265,283 individuals have been vaccinated with the second dose up to now, and the goal set for 2022-2024 is to reach 80% of vaccination coverage (https://shendetesia.gov.al/vaksinimi-anticovid-2963221-vaksinime/). Despite the difficulties experienced in vaccine procurement, Albania managed to provide them continuously and so far, 5 million doses of anti-COVID vaccines have been made available to the population (https://shendetesia.gov.al/wp-content/uploads/2022/04/buletini-mars.pdf).

Covid-19 vaccinations in Albania began on January 11, 2021. Comirnaty vaccine (Pfizer-Biontech), Vaxzevria - Astrazeneca, Covishield- Astrazeneca, Coronavac - Sinovac and Gam-COVID-vac - Sputnik V, are the types of vaccines that have been applied so far in our country (https://www.ishp.gov.al/zgjidh-jeten-vaksinohu/).

According to the last data presented at the Technical Committee of Experts Conference, the vaccination coverage with one dose for 12 years old and older groups, is over 50% while, for 16 years old and older vaccinated with two doses, is over 50%. Meanwhile, in the age group 70-80 years and above, the vaccination coverage with two doses is more than 70%. Low vaccination coverage is observed in the 40-50 age groups and in those under 40 and 30 years old. In the community of healthcare workers, the immunization coverage with two doses is over 80% and 93% with one dose (https://www.youtube.com/watch?v=ZVQgcstdRVY).

From the data reported, the challenge remains the vaccination of the young population, since the hesitancy demonstrated among them affects the national vaccination coverage. It was observed that the vaccination coverage among healthcare personnel is high and this achievement is in accordance with the updated WHO Covid-19 strategy, in which for healthcare workers and vulnerable groups is required 100% of vaccination coverage (https://news.un.org/en/story/2022/07/1123112). While reaching high levels of vaccination coverage all over the world is still considered the ticket out of this health crisis, the Covid-19 vaccine rumors regarding its safety, efficacy and necessity are continuously affecting people's beliefs and decisions.

Throughout the pandemic till the present day, dealing with the spread of online covid-19 rumors and false theories, remains a battle that must be won. Fake and unverified news could be rapidly spread if there is not paining attention to the right sources. For example, one of the most heard rumors during the pandemic was that people will face a run out of food. The impact of this rumor was shown immediately after its spread, as people all over the world were seen in long lines in front of grocery stores.

In a study carried out among 905 Albanian undergraduates, most of the participants have shown an adequate sense of apprehension and comprehension related to the Covid-19 pandemic (Gallè *et al.,* 2021). In another study carried out on a sample of 488 adult Albanian participants, with an average age of 21.17 years, it was observed the negative impact of the Covid-19 pandemic on mental health (Ndreu *et al*., 2022). Taking into consideration the conclusions drawn by the conducted studies and referring to the low coverage vaccination rates reported for these age categories, although the awareness among young age groups is high, this has not yet been translated into a decision to get vaccinated.

Many studies conducted recently evaluated how social media and other unreliability information sources have influenced people's attitudes and behavior during the Covid-19 pandemic

(Xiao *et al.,* 2021; Banerjee and Meena, 2021; Liu and Zuo, 2021; Liu *et al.,* 2021; Kemei *et al.,* 2021; Belson *et al.,* 2020). Most of the conducted studies, which were selected for this paper, came to the conclusion that social media platforms with no scientific basis content, through the distribution of Covid-19 vaccine rumors, could be the cause of producing fear, mistrust, promoting chaos and may strongly influence the psychological aspect of the population that uses them massively (Rocha *et al.,* 2021; Verma *et al.,* 2022; Skafle *et al.* ,2022, Lurie *et al.,* 2022; Ennab *et al.,* 2022; Kalayou *et al.,* 2022; Islam *et al.,* 2021; Abdoli *et al.,* 2020; Tasnim *et al.,* 2020; Ferreira Caceres *et al.,* 2022; Van Huijstee *et al.,* 2021). In this context, given that young people are the biggest consumers of social media (https://datareportal.com/reports/digital-2022-global-overview-report), this may explain the low approach of Albanian young people towards vaccination.

The data reported for persons vaccinated with at least one dose per 100 population in the Western Balkans region countries, are as follows: Turkey 69,66%, Malta 87,53%, Italy 84,56%, Kosovo 50,35%, Greece 73,79%, Croatia 57,12%, North Macedonia 41,15% (https://covid19.who.int/).

To improve the access of the Albanian population toward vaccination, like in other countries in the region, cooperation with all the factors and actors involved in the process is required. The effort of the government to establish a reference structure to address Covid-19 rumors; like the Federal Emergency Management Agency (FEMA) official website, will be in my opinion a significant step forward for a small country like Albania.

4. Conclusions

The national strategy against Covid-19 in Albania was primarily focused on interrupting the transmission of the infection and preserving maximum health capacities by identifying the priority groups for vaccination, followed by its availability for all age groups. Regardless of the undertaken measures, there is still hesitancy noticed among young people towards vaccination, which impacts the health and wealth of the population directly.

The danger of misinformation and disinformation in the Covid-19 crisis is still present therefore, targeting adequate information and addressing misinformation are necessary tools to increase overall national vaccination adherence and tackle vaccine hesitancy.

References

Abdoli A. (2020). Gossip, Rumors, and the COVID-19 Crisis. Disaster medicine and public health preparedness, 14(4), e29–e30. https://doi.org/10.1017/dmp.2020.272

Banerjee, D., Meena, K. S. (2021). COVID-19 as an "Infodemic" in Public Health: Critical Role of the social media. *Frontiers in public health*, *9*, 610623. https://doi.org/10.3389/fpubh.2021.610623

Broniatowski, D. A., Jamison, A. M., Johnson, N. F., Velasquez, N., Leahy, R., Restrepo, N. J., Dredze, M., Quinn, S. C. (2020). Facebook Pages, the "Disneyland" Measles Outbreak, and Promotion of Vaccine Refusal as a Civil Right, 2009-2019. *American journal of public health*, *110*(S3), S312–S318. https://doi.org/10.2105/AJPH.2020.305869

CDC (2018). https://www.cdc.gov/flu/pandemic-resources/1918-commemoration/1918-pandemic-history.htm

Dubé, E., Laberge, C., Guay, M., Bramadat, P., Roy, R., Bettinger, J. (2013). Vaccine hesitancy: an overview. *Human vaccines & immunotherapeutics*, *9*(8), 1763–1773. https://doi.org/10.4161/hv.24657

Dy vjet nga pandemia Covid-19 ne Shqiperi. (Mars 2022). https://shendetesia.gov.al/wp-content/uploads/2022/04/buletini-mars.pdf

ECDC (2022). https://www.ecdc.europa.eu/en/covid-19/questions-answers/questions-answers-basic-facts

Ennab, F., Babar, M. S., Khan, A. R., Mittal, R. J., Nawaz, F. A., Essar, M. Y., Fazel, S. S. (2022). Implications of social media misinformation on COVID-19 vaccine confidence among pregnant women in Africa. *Clinical epidemiology and global health*, 14, 100981. https://doi.org/10.1016/j.cegh.2022.100981

European Commission (2022). https://ec.europa.eu/info/live-work-travel-eu/coronavirus-response/safe-covid-19-vaccines-europeans_it

Ferreira Caceres, M. M., Sosa, J. P., Lawrence, J. A., Sestacovschi, C., Tidd-Johnson, A., Rasool, M., Gadamidi, V. K., Ozair, S., Pandav, K., Cuevas-Lou, C., Parrish, M., Rodriguez, I., Fernandez, J. P. (2022). The impact of misinformation on the COVID-19 pandemic. *AIMS public health*, 9(2), 262–277. https://doi.org/10.3934/publichealth.2022018

Gallè, F.; Veshi, A.; Sabella, E.A.; Çitozi, M.; Da Molin, G.; Ferracuti, S.; Liguori, G.; Orsi, G.B.; Napoli, C.; Napoli, C. (2021). Awareness and Behaviors Regarding COVID-19 among Albanian Undergraduates. Behav. Sci. 2021, 11, 45. https://pubmed.ncbi.nlm.nih.gov/33807250/

Global Overview Report - DataReportal." 26 Gen. 2022, https://datareportal.com/reports/digital-2022-global-overview-report

Islam MS, Kamal A-HM, Kabir A, Southern DL, Khan SH, Hasan SMM, et al. (2021) COVID-19 vaccine rumors and conspiracy theories: The need for cognitive inoculation against misinformation to improve vaccine adherence. *PLoS ONE* 16(5): e0251605. https://doi.org/10.1371/journal.pone.0251605

Kalayou MH, Awol SM. (2022). Myth and Misinformation on COVID-19 Vaccine: The Possible Impact on Vaccination Refusal Among People of Northeast Ethiopia: A Community-Based Research. *Risk Manag Healthc Policy.* 15:1859-1868. https://doi.org/10.2147/RMHP.S366730

Kemei, J., Alaazi, D. A., Tulli, M., Kennedy, M., Tunde-Byass, M., Bailey, P., Sekyi-Otu, A., Murdoch, S., Mohamud, H., Lehman, J., Salami, B. (2022). A scoping review of COVID-19 online mis/disinformation in Black communities. *Journal of global health,* 12, 05026.

Konferencë e Komitetit Teknik të Ekspertëve (26 Prill 2022). YouTube." https://www.youtube.com/watch?v=ZVQgcstdRVY

Lee, S. K., Sun, J., Jang, S., Connelly, Sh. (2022). Misinformation of COVID-19 vaccines and vaccine hesitancy. *Scientific Reports*. 12. 13681. https://doi.org/10.1038/s41598-022-17430-6

Liu, F., Zuo, M. (2021). Learn From the Rumors: International Comparison of COVID-19 Online Rumors Between China and the United Kingdom. Journal of Database Management (JDM), 32(3), 46-68.

Liu, Y., Qin, Z., Ye, Z., Zhang, X., Meng, F. (2021). "Explaining Trust and Consequences of COVID-19 Rumors on Social Media: A SOR Perspective". **PACIS 2021 Proceedings**. 131.https://aisel.aisnet.org/pacis2021/131

Lurie P, Adams J, Lynas M, *et al.* (2022). COVID-19 vaccine misinformation in English-language news media: retrospective cohort study. *BMJ* Open. 12:e058956. doi:10.1136/ bmjopen-2021-058956

Ministria e Shëndetësisë dhe Mbrojtjes Sociale (2022). https://shendetesia.gov.al/

Ministria e Shëndetësisë dhe Mbrojtjes Sociale (2022). https://shendetesia.gov.al/vaksinimi-anticovid-2963221-vaksinime/

Ndreu V, Themeli Y, Zekja I, Kamberi F. (2022). Psychological Distress due to COVID-19 in the Albanian Adult Population. OBM Neurobiology; 6(3): 126; https://www.lidsen.com/journals/neurobiology/neurobiology-06-03-126.

Nelson, T., Kagan, N., Critchlow, C., Hillard, A., Hsu, A. (2020). The Danger of Misinformation in the COVID-19 Crisis. *Missouri medicine*, *117*(6), 510–512.

Plani Kombëtar i Vaksinimit ndaj Covid -19. (2021). https://shendetesia.gov.al/wp-content/uploads/2021/02/4-SHQIP.pdf

Republic of Albania. (2017). https://2009-2017.state.gov/outofdate/bgn/albania/100040.htm

Skafle, I., Nordahl-Hansen, A., Quintana, D. S., Wynn, R., Gabarron, E. (2022). Misinformation About COVID-19 Vaccines on Social Media: Rapid Review. *Journal of medical Internet research*, *24*(8), e37367. https://doi.org/10.2196/37367

Tasnim, S., Hossain, M. M., Mazumder, H. (2020). "Impact of rumors or misinformation on coronavirus disease (COVID-19) in social media," SocArXiv uf3zn, *Center for Open Science*. https://ideas.repec.org/p/osf/socarx/uf3zn.html

The World Bank (2021). https://datahelpdesk.worldbank.org/knowledgebase/articles/906519-world-bank-country-and-lending-groups

United Nation (22 July 2022). WHO updates COVID-19 strategy in bid to vaccinate all health workers, those most at risk. https://news.un.org/en/story/2022/07/1123112

Van Huijstee, D., Vermeulen, I., Kerkhof, P. Droog, E. (2022), Continued influence of misinformation in times of COVID-19. *Int J Psychol*, 57: 136-145. https://doi.org/10.1002/ijop.12805

Verma, G., Bhardwaj, A., Aledavood, T., De Choudhury, M., Kumar, S. (2022). Examining the impact of sharing COVID-19 misinformation online on mental health. *Scientific Reports*, *12*(1), 1-9. [8045]. https://doi.org/10.1038/s41598-022-11488-y

WHO Coronavirus (COVID-19) Dashboard (2022). https://covid19.who.int/

WHO. Covid-19 vaccines. https://www.who.int/emergencies/diseases/novel-coronavirus-2019/covid-19-vaccines

Xiao, Q., Huang, W., Zhang, X., Wan, S., Li, X. (2021). Internet Rumors During the COVID-19 Pandemic: Dynamics of Topics and Public Psychologies. *Frontiers in public health*, *9*, 788848. https://doi.org/10.3389/fpubh.2021.788848

Yasmim, M.R., Gabriel Acácio de Moura, Gabriel Alves Desidério, Carlos Henrique de Oliveira, Francisco Dantas Lourenço, Larissa Deadame de Figueiredo Nicolete. (2021). The impact of fake news on social media and its influence on health during the COVID-19 pandemic: a systematic review. *Journal of Public Health*. https://doi.org/10.1007/s10389-021-01658-z

Zgjidh Jetën, VAKSINOHU – Instituti i Shëndetit Publik. (Maj 2022). https://www.ishp.gov.al/zgjidh-jeten-vaksinohu/

ISBN: 978-2-931089-30-9

Community Pharmacists' Impact on Public Awareness During the Covid-19 Crisis in Albania

Silvi BOZO*
Faculty of Pharmacy, Catholic University "Our Lady of Good Counsel", Tirana, Albania. - Albania
Irsida MEHMETI
Faculty of Pharmacy, Catholic University "Our Lady of Good Counsel", Tirana, Albania. - Albania

Abstract: Community pharmacists represent an important public asset for the dissemination of useful health information and establish a trustful relationship with their patients, furtherly emphasized during the COVID-19 pandemic. The purpose of this study was to evaluate the role of Albanian community pharmacists during the pandemic and to analyse practices and attitudes, which may influence public awareness and contribute significantly to health promotion in general. To address the key aspects of our research, we conducted a survey in a group of 152 Albanian community pharmacists, (84.9% females and 15.1% males), aged 23 to 73 years and living mostly in urban areas (96.1%). An anonymous specific questionnaire was used for this study and the completion time from the participants was July-December 2021. Most of the participants in the survey (82.8%) declared that during COVID-19 pandemic have offered an increased and improved service to their patients. They also declare that there have been significant changes in the prescription of critical drugs, such as antibiotics. At the same time, they provided full support for their patient to better address their needs in terms of health and prevention. For instance, 98% of pharmacists advised the patient to seek medical help or to undergo testing, for patients who presented symptoms of COVID-19. In addition, there has been an increase of the working hours of the pharmaceutical service by about 20% compared to the pre-COVID period, which continues today. According to the pharmacists' opinion (88.8%), the pandemic has influenced very positively the improvement of communication, provision of information and health care awareness not only for patients, but also for the population in general. In a developing country, like Albania, it is highly important to acknowledge and recognize the important role of the community pharmacist as socio-health safeguards and strengthening the collaboration with other professionals and society. The results of the present study, as well as other studies in this area, may help pharmacists to provide the right patient care and act as a competent professional contact, to deal with future health emergencies and healthcare challenges, such as COVID-19. They also aim to give an insight view on the pharmacy community sector and identify areas for improvement by policy makers.

Keywords: public awareness; COVID-19; developing country; pharmacy

1. Introduction

The professional figure of the community pharmacist has always played a key role in the production, control, and distribution of drugs to the public as well as in assuring the success of therapy adherence and pharmacovigilance (Petrelli F *et al*, 2019). Nowadays, the pharmacist is acquiring an increasingly broad and decisive role, exercising an all-out duty, not exclusively based on services but centred on the patient. He serves as a reference point for patients to solve issues related to the medical therapy but also to direct them towards healthy lifestyles, disease

* Corresponding Author: s.bozo@unizkm.al

prevention, and well-being in general. For this reason, the right dialogue between the pharmacist and the patient is essential to transfer the right information and promote the health of the population (Olson AW *et al*, 2021).

Nevertheless, community pharmacies open to the public are facing various challenges, operating in a dynamic sector with new market scenarios and changes in public needs. (Gregório J *et al*, 2021). One of the most recent examples was the COVID-19 pandemic which caused a strain on the health system all over the world but at the same time confirmed the role and the enormous strategic support of the pharmacists. In many countries, pharmacies have activated and expanded their services for the prevention and containment of the infection to guarantee the safety of citizens (Motulsky A, 2020). These services include home delivery of medications, COVID-19 testing and even anti-COVID vaccinations as part of national projects. Moreover, during these challenging times, pharmacists have been one the most accessible healthcare professionals especially for geriatrics and patients with chronic diseases (Kretchy *et al*, 2020).

On the other hand, international organizations acted and responded at a global level to guide and support pharmacists during the COVID-19 pandemic. The International Pharmaceutical Federation (FIP), a global body with 151 national organizations, including the Pharmacists Order of Albania, published an interim guidance, last updated on 15 July 2020 (FIP, 2020). The Pharmacists Order of Albania translated and disseminated these guidelines among the pharmacists in our country in April 2020 (https://www.ufsh.org.al).

Developing countries like Albania, struggled even more throughout the pandemic given the limited healthcare resources, movement restrictions and lockdowns. Indeed, there have been significant efforts to assure the adequate medical assistance and continuous public awareness regarding COVID-19 prevention and treatment (Zeenny RM *et al*, 2021).

This scenario, therefore, requires a highly qualified professional figure in pharmacy practice, with a solid scientific background integrated with management and communication skills, also contributing to health education and public awareness on the prevention and treatment of diseases.

For these reasons, the purpose of this study was to evaluate the role of Albanian community pharmacists during the pandemic and to analyse practices and attitudes, which may influence public awareness and contribute significantly to health promotion in general.

2. Materials and Methods

To address the key aspects of our research, we conducted a survey in a group of 152 Albanian community pharmacists. An anonymous specific questionnaire was used for this study and the completion time from the participants was July-December 2021.

Data collection

The socio-demographic characteristics of interviews community pharmacists are shown in Table 1.

Table 1: *Socio-demographic characteristics of interviews community pharmacists*

Variables		N	%
Age (years)	23-30	54	35.5
	31-40	72	47.4
	41-50	20	13.2
	>50	6	3.9
Gender	Female	129	84.9
	Male	23	15.1
Work experience	≤2	32	21.1
	3-5	28	18.4
	6-10	44	28.9
	>10	48	31.6

Variables		N	%
Residence	Urban Area Rural area	146 6	96.1 3.9
City	Tirana Other cities	109 43	71.7 28.3

The participants were mostly females (84.9% females and 15.1% males), aged 23 to 73 years (mean age of 33±7.29 years) and living primarily in urban areas (96.1%). The highest percentage of community pharmacists were working in the capital, Tirana (71.7%) and had more than ten years of work experience (31.6%).

3. Results and discussion

Results of the number and frequency of community pharmacists according to the answer given for each question are shown in Table 2.
Most of the participants in the survey (82.8%) declared that during COVID-19 pandemic have offered an increased and improved service to their patients. In addition, there has been an increase of the working hours of the pharmaceutical service by about 20% compared to the pre-COVID period, which continues today. In many countries during the lockdown period, pharmacies were one of the few services that have not had any changes in the working schedule (Ghibu S *et al*, 2021). In Albania, even in the first months of COVID-19 where pharmacies as well as other services were forced to adapt to the closing hours imposed by the government, they continuously tried to respond to the emergency needs of the public regarding the supply of medicines. In fact, 65.8% of the participants in our study declared that they have always or occasionally offered home delivery to their patients. These efforts are of even greater value when we consider the enormous difficulties that have strained pharmacies during the pandemic. On one hand, pharmacists found themselves faced with a growing demand from the public, also due to ''*panic buying*'' or ''*stockpiling*'', but on the other hand they faced a significant reduction in drug supply (Cameron EE *et al*, 2021; Shuman AG *et al*, 2020). For these reasons, pharmacists must carefully advise the patients to supply themselves only with essential medicines to rationalize the resources and the workflow of the market.

Table 2: *Answers regarding aspects related to the COVID-19*

Question	Options	N (%)
Did the COVID-19 pandemic impact on your service quality?	Has not impacted I have extended my working hours I have reduced my working hours	89 (58.5) 37 (24.3) 26 (17.2)
Have you offered delivery service during the pandemic?	Yes, always Occasionally Never	41 (27) 59 (38.8) 52 (34.2)
Was there abuse in the prescription and use of antibiotics during the Covid pandemic in Albania?	I do not know Not at all More or less Yes	5 (3.3) 6 (3.9) 43 (28.3) 98 (64.5)
How did you act when a patient complained of symptoms like Covid-19?	Told him there is nothing to worry about Referred him to the physician Advised him to undergo COVID-19 testing Other	2 (1.3) 123 (80.9) 26 (17.1) 1 (0.7)
Does the pandemic have influenced positively the communication, information, and health care awareness of the population?	Yes No	135 (88.8) 17 (11.2)
Do you need training related to COVID-19?	Yes No	112 (73.7) 40 (26.3)

Community pharmacists in our survey also declared that there have been significant changes in the prescription of critical drugs. For instance, 64.5 % of them noticed a huge increase in the prescriptions of antibiotics. The increased use of antibiotics and the associated risk of antimicrobial resistance is another pre-existing worldwide concern that exacerbated during COVID-19 (Clancy CJ *et al*, 2020). Community pharmacists, as frontline professionals, should play a key role in the fight against antimicrobial resistance by guiding their patients to a correct and rational use of antibiotics as well as dispensing these medicines exclusively with a medical prescription with the aim to raise public awareness.

Furthermore, being in close contact with patients every day, pharmacists may find themselves faced with different situations where they must accurately analyse the symptomology to decide whether to dispense products, advice or refer the patient to the physician or at a hospitalization facility (Cadogan CA *et al*, 2020). This aspect is even more important during public emergencies such as COVID-19.

The results of our study have shown that, Albanian pharmacists provided full support for their patient to better address their needs in terms of health and prevention. For instance, 98% of pharmacists advised the patient to seek medical help or undergo testing, for patients who presented symptoms of COVID-19. These practices are also consistent with the Technical Guidance published by the World Health Organization (WHO) Regional Office for Europe for community pharmacists (WHO, 2020). Disseminating accurate, current, and evidence-base information is another key-factor for the profession and a fundamental criteria for public education. However, even in this case there are several challenges, as pharmacists must also be able to manage patient fears and concerns. During the COVID-19 pandemic, this has contributed to mental health issues in many cases, which could have aggravated by the fake news circulating regarding novel treatments and the existence of the infection itself (Carrion-Alvarez D and Tijerina-Salina PX, 2020; Venegas-Vera AV *et al*, 2020; Hayden JC *et al*, 2020).

In addition to a strong basic education, to achieve these goals it is important that pharmacists participate in training courses, especially in times where the information changes rapidly and they should constantly keep up to date. When asked about the need of training, most of the surveyed professionals (73.7%) responded that they need training. These findings indicate that further interventions are needed at a territorial level to increase the level of knowledge and the involvement of Albanian community pharmacists in training courses.

Moreover, in our survey, according to the pharmacists' opinion (88.8%), the pandemic has influenced very positively in the improvement of communication, provision of information and health care awareness not only for patients, but also for the population in general.

In this contest, trust is considered as central to build a strong medical relationship with positives outcomes in patient information, therapy adherence and overall health promotion (Gregory PA and Austin Z, 2020). Morrison *et al* stated that pharmacist familiarity and role awareness are principal factors that influence patient trust in community pharmacists and should be considered in the development of national plans to increase the role of the pharmacy practice (Morrison B *et al*, 2022).

COVID-19 has highlighted the importance of pharmacists and their teams with regards to the role and support they offer to the community. Hoping that we are moving close to the end of the pandemic, it is crucial to cement the recognition they received during this time, as an integral part of the healthcare system. Finally, as an irreplaceable asset for health and wellness promotion, they should be a crucial part of public health educational campaigns nationwide.

4. Conclusion

In a developing country, like Albania, it is highly important to acknowledge and recognize the important role of the community pharmacist as socio-health safeguards and strengthening the

collaboration with other professionals and society. The results of the present study, as well as other studies in this area, may help pharmacists to provide the right patient care and act as a competent professional contact, to deal with future health emergencies and healthcare challenges, such as COVID-19. They also aim to give an insight view on the pharmacy community sector and identify areas for improvement by policy makers.

References

Cadogan CA, Hughes CM. On the frontline against COVID-19: Community pharmacists' contribution during a public health crisis. Res Social Adm Pharm. 2021 Jan;17(1):2032-2035.

Cameron EE, Moss SA, Keitaanpaa SJ, Bushell MA. Pharmacists' experiences of consumer stockpiling: insights from COVID-19. J Pharm Pract Res. 2021 Dec;51(6):464-471.

Carrion-Alvarez D, Tijerina-Salina PX. Fake news in COVID-19: A perspective. Health Promot Perspect. 2020 Nov 7;10(4):290-291.

Clancy CJ, Buehrle DJ, Nguyen MH. PRO: The COVID-19 pandemic will result in increased antimicrobial resistance rates. JAC Antimicrob Resist. 2020 Sep;2(3): dlaa049.

content/priority-areas/coronavirus/Coronavirus-guidance-update-ENGLISH.pdf,

Ghibu S, Juncan AM, Rus LL, Frum A, Dobrea CM, Chiş AA, Gligor FG, Morgovan C. The Particularities of Pharmaceutical Care in Improving Public Health Service during the COVID-19 Pandemic. Int J Environ Res Public Health. 2021 Sep 16;18(18):9776.

Gregório J, Cavaco A. The pharmacist's guide to the future: Are we there yet? Res Social Adm Pharm. 2021 Apr;17(4):795-798.

Gregory PA, Austin Z. How do patients develop trust in community pharmacists? Res Social Adm Pharm. 2021 May;17(5):911-920.

Hayden JC, Parkin R. The challenges of COVID-19 for community pharmacists and opportunities for the future. Ir J Psychol Med. 2020 Sep;37(3):198-203.

https://www.ufsh.org.al/content/uploads/2020/04/UDH%c3%8bZIME%20P%c3%8bR%20FARMACIST%c3%8bT%20DHE%20STAFIN%20E%20FARMACIS%c3%8b.pdf

International Pharmaceutical Federation (FIP Health Advisory). Coronavirus 2019-

Morrison B, Boyle TA, Mahaffey T. Awareness, Familiarity, and Pharmacist Trust: A Structural Equation Model Analysis. J Pharm Technol. 2022 Jun;38(3):174-182.

Motulsky A, Weir DL, Liang M, et al. Patient-initiated consultations in community

nCoV Outbreak. Information and interim guidelines for pharmacists and the pharmacy workforce 2020 The Netherlands. Available from: https://www.fip.org/files/

Olson AW, Vaidyanathan R, Stratton TP, Isetts BJ, Hillman LA, Schommer JC. Patient-Centered Care preferences & expectations in outpatient pharmacist practice: A three archetype heuristic. Res Social Adm Pharm. 2021 Oct;17(10):1820-1830.

Petrelli F, Tiffi F, Scuri S, Nguyen CTT, Grappasonni I. The pharmacist's role in health information, vaccination, and health promotion. Ann Ig. 2019 Jul-Aug;31(4):309-315.

pharmacies. Res Soc Adm Pharm. 2020.

Shuman AG, Fox ER, Unguru Y. COVID-19 and Drug Shortages: A Call to Action. J Manag Care Spec Pharm. 2020 Aug;26(8):945-947.

Venegas-Vera AV, Colbert GB, Lerma EV. Positive and negative impact of social media in the COVID-19 era. Rev Cardiovasc Med. 2020 Dec 30;21(4):561-564.

World Health Organization. Regional Office for Europe. (2020). Strengthening the health systems response to COVID-19: technical guidance #4: community pharmacy, 1 May 2020. World Health Organization. Regional Office for Europe. https://apps.who.int/iris/handle/10665/332572.

Zeenny RM, Dimassi A, Sacre H, El Khoury G, Hajj A, Farah R, Hajj H, Lahoud N, Akel M, Hallit S, Salameh P. A cross-sectional survey on community pharmacists' readiness to fight COVID-19 in a developing country: knowledge, attitude, and practice in Lebanon. J Pharm Policy Pract. 2021 Jun 11;14(1):51.

ISBN: 978-2-931089-30-9

The relationship between flexible rewards and subjective performance

Arta JASHARI GOGA*
University of Applied Science Ferizaj - Kosovo

Abstract: Recent years to many enterprises are dealing with many issues to employee's job performance and overall job satisfaction. Flexible rewards as one of human resource management practices have so much impact on employees, which increase the level of employee work satisfaction and improve the level of their performance. This paper analyzes the impact of flexible rewards on subjective performance, respectively on individual performance, group performance and organizational performance in 182 medium enterprises on service sector of economy in Kosovo. We have used questionaries forms to collect data and we have use statistical analysis software (SPSS 25.00) to analyze them. By using simple linear regression, we have predicted the impact of flexible reward on the subjective performance of the enterprise. Our study has found a significant relationship between flexible rewards and performance: a) Individual performance with high positive correlation .630**, regression R^2=.396, ΔR^2=.383, F test of statistical significance = 29.167 and p value= .000. b) Group performance: with a high positive correlation of .633**, R^2 = .401, ΔR^2 = .387, the test of statistical significance F = 29.717 and p value =.000 and c) Organizational performance: with a high positive correlation. 515**, regression R^2= .265, as well as ΔR^2 = .248, F test of statistical significance = 16.019 and p value =.000.

Keywords: Flexible Rewards, Employees performance, Kosovo.

Introduction

Every company that operates in the market struggles to increase its level of performance, to create long-term relationships with customers and to have stability in the market. The leaders of successful enterprises apply a series of practices in the management of their employees, among these practices they see the practice of flexible remuneration as very important.

Since the human resource is the most important asset of every enterprise, it is precisely the people (employees) who, with their knowledge and the work they do, turn the plans and goals of the enterprise into results that create profits and a good reputation in the market, therefore, the leader's attention is on finding different ways of managing the reward practice for their motivation.

Managers use flexible rewards to motivate their employees to achieve higher levels of performance but also to attract qualified new employees.

According to Schuler and Jackson (1996), some employees prefer financial rewards, while others prefer non-financial rewards, therefore, good, and flexible management of rewards practice

* Corresponding Author: arta.jashari@ushaf.net

brings desired results. In this way employees feel that they are being valued by the employers and feel that the enterprise is seriously involved in the employee's career and development. So, these rewards contribute to improve the satisfaction level of workers (Dewhurst, 2010).

The purpose of this study is to analyze the situation of Kosovar enterprises in the service sector regarding the application of the practice of flexible remuneration and the impact that this practice brings on improving performance, respectively its impact on individual, group, and organizational performance.

Literature review

The reward system is a central and integrated feature of the approach to human resource management (Torrington et al. 2004).

More and more enterprises create employee management policies and practices to influence the increase of their engagement and keep their motivation at the level that would create the increase in the performance of each of them and thus the performance of the entire company.

According to Wang (2004), in so many organization rewards play important roles in sustaining and creating commitment among employees for good performance and that better performance leads to job satisfaction. Also, Ali & Ahmad, (2009) investigated that there is positive relationship between “recognition and reward”, “motivation and satisfaction”. They stated that if reward and recognition are given to employee then there is a huge change in their motivation and satisfaction.

Remuneration is the compensation that an employee receives from an enterprise in exchange for the service provided by the employee or in return for work done (Lin, 2007).

Flexible rewards are known to help companies boost employee motivation, thus leading to employee satisfaction. Bowen and Ostroff (2004) stated that happy employees can create happy customers. Thus, an enterprise should seriously look at the contribution of rewards to control the level of employee satisfaction in maintaining performance.

According to the Business Dictionary, compensation is the number of direct benefits such as salary, aid, bonuses, or even indirect benefits such as insurance, pension plans, vacations that an employee receives from the employer. While the reward, according to the same, is a scheme to support and reinforce the desired behavior, such as an increase in salary based on work productivity.

In the 1960s, there were several theorists who conducted research studies on an individual's motivation in the workplace. One of these theorists was Maslow (1943), who created the hierarchy of needs theory. According to this theory, human beings have five needs, and their goal is to satisfy their lowest level needs first. At this level, an individual's needs are quite basic. For example, at this level, human beings try to fulfill their physiological needs and their safety. The highest levels of needs consist of the individual wanting to satisfy their needs for affiliation, gaining self-esteem, and self-actualization. Simply put, Maslow's work focused on how an individual's attitudes affect his/her behaviors.

Using the method of Maslow's theory, Porter (1963) conducted a study that showed how people in low-level jobs focused on fulfilling their lowest needs. Such needs include wages and job security. They would only move to higher level needs if they were also able to move to a higher job position. Of course, this would only happen after the lower-level needs have been met.

The two-factor theory which was designed by Frederick Herzberg in 1959 is closely related to Maslow's hierarchy of needs, but this theory has introduced more factors to measure how individuals are motivated in the workplace. Although, this theory explains that fulfilling the lower-level needs (extrinsic factors or hygiene) of individuals would not motivate them to exert

effort but would only prevent them from being dissatisfied. To motivate employees, higher level needs (intrinsic or motivational factors) must be satisfied. The implication for companies to use this theory is that meeting extrinsic, or employee hygiene factors will only prevent employees from becoming actively dissatisfied but will not motivate them to contribute additional effort to a better performance. To motivate employees, companies should focus on supplying intrinsic or motivational factors (Robbins, 2009).

Types of rewards. There are several types of reward systems that companies can use. The intrinsic reward system is that which is inherent in the work and which the individual enjoys because of successfully completing the task or achieving his goals. On the other hand, external reward comes from outside and is tangible to evaluate the task performed by the employee. Extrinsic rewards include salary, working conditions, fringe benefits, security and promotion, service contract, incentives, pay and job security, working environment and working conditions.

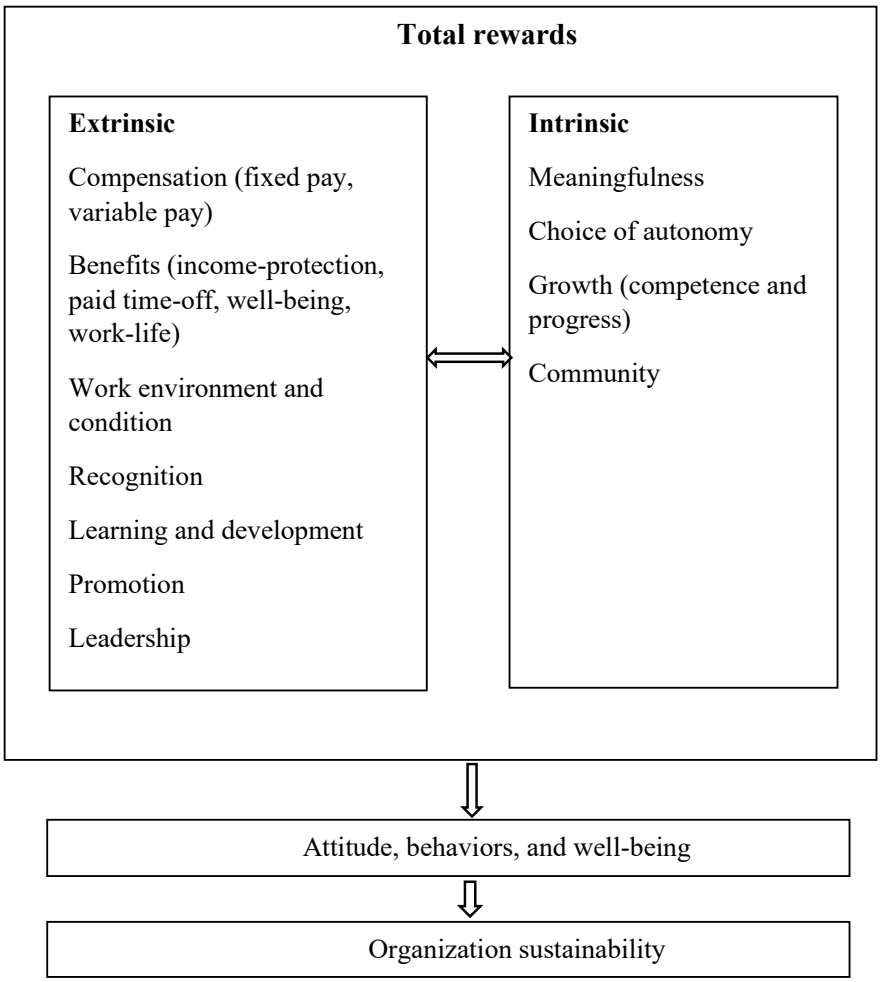
Intrinsic reward is related to the psychological development of employees (Williamson et al. 2009). The internal reward system is intentionally created to evaluate employees in the form of self-esteem and related to their sense of achievement and growth with the enterprise. Employees feel satisfied when they achieve something valuable at work and are appreciated by the organization.

Intrinsic rewards are those that exist at work. Examples are achievement, change, challenge, autonomy, responsibility, and personal and professional growth. They also include status, recognition, praise from superiors and peers, personal satisfaction, and feelings of self-worth (Mahaney & Lederer 2006). Intrinsic rewards increase feelings of self-confidence and achievement. Intrinsic rewards derive from the content of the task itself and include factors such as interesting and challenging work, self-direction and responsibility, variety, creativity, opportunities to use one's skills and abilities, and adequate feedback regarding the effectiveness of effort. one's (Mottaz 1985). Employees are thought to be motivated to work hard to produce quality results when they have pride in their work, they believe their efforts are important to the team's success, and their jobs are fun, challenging, and rewarding (Mahaney & Lederer 2006).

Extrinsic rewards on the other hand, are external to the job. They include elements such as salary, fringe benefits, job security, promotions, private office space, and social climate. Other examples include competitive wages, pay, merit bonuses, and such indirect forms of pay as compensatory time (Mottaz 1985, 366, Mahaney & Lederer 2006). Firms can improve worker productivity by paying workers a raise—a wage that is above the wage paid by other firms for comparable work. A pay raise can increase productivity by boosting morale, encouraging greater commitment to the firm's goals. As a result, people are attracted to jobs with better pay, add extra effort to perform activities that bring them more pay, and become anxious if their pay is threatened or reduced (Stajkovic & Luthans 2001). Extrinsic rewards are used to show that the company is serious about valuing the team's contributions to quality. Monetary rewards consist of a cash bonus allocated to each team member. The team bonus will be awarded separately from the salary. On the other hand, team rewards should be used in ways that avoid destroying employees' intrinsic motivation to do their jobs. The need for continuous improvement requires employees to be innovative; creating new solutions that improve a work process or that satisfy the customer

The following figure presents the scheme of total rewards.

Figure: *Total rewards*



Source: Monica Franco-Santos & Luis Gomez-Mejia (2015) page 3.

Subjective performance.

It is important for companies to move beyond financial performance indicators to examine non-financial measures that contribute to long-term value creation (Anderson and McAdam, 2004). Speed, quality, and flexibility, in addition to cost, have emerged as the three most competitive attributes. Managers need current non-financial information to be able to take better actions or decisions (Bassioni et al., 2004).

According to Marr et al., (2003) financial performance measures should be supplemented or replaced by non-financial measures because they are more informative about employee actions and can improve engagement. According to many authors, examining performance through non-financial measures can provide insights into organizational processes and outcomes that cannot be seen through financial measures.

Non-financial measures can help managers recognize changes in the business environment, determine and evaluate progress towards business objectives and affirm the achievement of performance goals (Hoque, 2004).

Also, Anderson and McAdam (2004) state that non-financial measures are shorter than financial measures, as the measures are measurable and accurate, meaningful to the workforce facilitating continuous improvement and are consistent with organizational goals and strategies. In addition, non-financial measures are flexible and dynamic and therefore able to change as market needs change. Non-financial measures may include information on employee turnover,

market share, customer satisfaction, efficiency and productivity, product quality, employee satisfaction and number of products launched (Phang et al. 2006).

Furthermore, there is a view that a better predictor of an organization's long-term performance is non-financial measures and that they help managers monitor and evaluate their firm's progress towards strategic goals.

The impact of flexible reward practice on performance. In general, reward practice has been functional to increase employees' abilities, commitments, and efforts, with the aim of increasing organizational performance (Takeuchi et al. 2007).

The effective implementation of flexible remuneration in the enterprise affects the creation of a good performance of the enterprise as well as its sustainability.

As the world becomes more competitive and more volatile than ever before, service-based industries are trying to gain competitive advantage at all costs and are turning to more innovative resources through flexible rewards.

Flexible compensation is conceptualized as a consolidated internal policy and practice designed and implemented to ensure that a firm's human capital contributes to the achievement of its objectives (Delery & Doty, 1996).

Likewise, Minbaeva (2005) saw flexible remuneration as a practice used by the company to manage human resources.

Methodology

Research methodology followed was quantitative methodology, which involved descriptive questionnaire constructed for the purposes of the current research. The questionnaire was divided into two sections. The first one aimed at analyzing companies' flexible rewards. The second one was related to the subjective performance of the company,

In this empirical study, the target population was medium enterprises operating in Kosovo.

Kerlinger (1986) states that sampling is the taking of a portion of a target population as representative of that population. The selected sample is a probability-random sample, drawn from the last base of the Tax Administration of Kosovo (ATK), in the Ministry of Trade and Industry (MTI).

Of the 186,303 enterprises registered in Kosovo, 344 or (0.18%) are medium-sized enterprises, therefore the population size for this study was 182 enterprises.

In this empirical study, the target population was medium enterprises operating in Kosovo.

Kerlinger (1986) states that sampling is the taking of a portion of a target population as representative of that population. The selected sample is a probability-random sample, drawn from the last base of the Tax Administration of Kosovo (ATK), in the Ministry of Trade and Industry (MTI).

The sample calculation is done using the following formula:

X=Z (c/100)2 r(100-r)
n=N x/[(N-1) E^2+x]
E= Sqrt [(N-n)^x/(nN-n)]

Where:
n: sample size
E: margin of error
N: population size
r: expected rate of return of responses
Z (c/100): the critical value of the confidence level

In most management research, researchers are content to estimate population characteristics with 95% confidence within the plus/minus 3% to 5% range. Considering that the population size of this study was 344, we determined a 95% confidence interval and a 5% margin of error, where the sample size resulted in 182 enterprises.

Results

Normality test

The normality test is of great importance in data processing, as it determines which statistical tests we will use, parametric or non-parametric. The results show that in all cases, our data show non-normal distribution as the p value is less than .05% and, in this case, we will use non-parametric tests for hypothesis validation.

Table 1. *Tests of normality for flexible reward*

	Kolmogorov-Smirnov[a]			Shapiro-Wilk		
	Statistic	Df	Sig.	Statistic	df	Sig.
Flexible reward	.139	319	.000	.909	319	.000

a. Lilliefors Significance Correction

Table 2. *Tests of normality for subjective performance*

	Kolmogorov-Smirnov[a]			Shapiro-Wilk		
	Statistic	df	Sig.	Statistic	df	Sig.
Individual subjective performance	.100	319	.000	.973	319	.000
Group subjective performance	.170	319	.000	.927	319	.000
Organizational subjective performance	.085	319	.000	.968	319	.000

a. Lilliefors Significance Correction

Assessment of data reliability

To test the reliability of the measurement scales, we used the Cronbach alpha (α) coefficient.

The Cronbach alpha coefficient is the most accepted method by researchers to date, for assessing the reliability of measurements. The values that the Cronbach alpha coefficient (α) can take are from 0 to 1, its values of 0.70 and above are considered "acceptable" in most research cases in the social sciences (Cronbach, 1951). From the following table we see that the reliability of the questionnaire applied for this study is quite high.

Table 3. *Cronbach Alpha coefficient (α) for flexible reward*

Variable	Units	Coefficient Alpha (α)
Flexible reward	(5)	.789

Table 4. *Flexible reward*

	Totally Disagree		Disagree		Neutral		Agree		Totally Agree	
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %
The compensation is decided based on the competence or ability of the employee	5	1.6%	12	3.8%	47	14.7%	170	53.3%	85	26.6%
Compensation is directly linked to performance	3	0.9%	13	4.1%	42	13.2%	165	51.7%	95	29.8%
The compensation system is attractive for employees	0	0.0%	9	2.8%	37	11.6%	159	49.8%	114	35.7%
Salary reflects standard of living	3	0.9%	6	1.9%	45	14.1%	136	42.6%	128	40.1%
The salary is comparable to the market	0	0.0%	3	0.9%	43	13.5%	103	32.3%	170	53.3%

In the results of flexible compensation as a human resources practice, we see that Kosovar companies set compensation based on the competence and ability of employees, and link it directly to the employee's performance. Managers/owners also state that their compensation system is attractive to employees and that pay reflects the standard of living and is comparable to the market.

Subjective performance

As we have shown in the previous chapters, we have measured the subjective performance of the company in three groups, the individual, group and organizational. Below are the results obtained from the questionnaires.

In measuring individual performance, managers agree that individuals/employees can see things in new and different ways, and that employees take pride in their work, accept criticism, and generate new skills. The individual aspect is presented as an important attribute for the development of enterprises and quality in general, which has a high impact on group work.

Table 5. *Individual performance*

	Totally disagree		Disagree		Neutral		Agree		Totally Agree	
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %
Individuals can break through traditional mind sets to see things in new and different ways	14	4.4%	61	19.1%	86	27.0%	124	38.9%	34	10.7%
Individuals feel a sense of pride in their work	3	0.9%	41	12.9%	110	34.5%	110	34.5%	54	16.9%
Individuals have a clear sense of direction in their work	4	1.3%	48	15.0%	76	23.8%	133	41.7%	58	18.2%
Individuals are aware of critical issues affecting their work	10	3.1%	35	11.0%	87	27.3%	137	42.9%	48	15.0%
Individuals generate a lot of new knowledge	3	0.9%	45	14.1%	101	31.7%	130	40.8%	39	12.2%

The group aspect is also an important factor in the development of enterprises, where managers/owners state that they have effective solutions for problems when working in groups and encourage group work. They agree that the groups are made up of the right people to address the issues and that everyone's opinion is sought in the meeting.

Table 6. *Group performance*

	Totally disagree		Disagree		Neutral		Agree		Totally Agree	
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %
We are effective problem solvers when we work in groups.	8	2.5%	37	11.6%	71	22.3%	150	47.2%	52	16.4%
Different viewpoints are encouraged in group work.	5	1.6%	42	13.2%	78	24.5%	133	41.7%	60	18.8%
Groups are prepared to revise decisions when presented with new information.	6	1.9%	44	13.8%	67	21.0%	125	39.2%	75	23.5%
In meetings, we seek to understand everyone's point of view.	6	1.9%	29	9.1%	76	23.8%	95	29.8%	113	35.4%
Groups have the right people involved in addressing the issues.	3	0.9%	28	8.8%	58	18.2%	82	25.7%	126	39.5%

Table 7. Organizational performance

	Significant decline		Decline		Same as before		Increase		Significant increase	
	Count	Row %	Count	Row %	Count	Row %	Count	Row %	Count	Row %
Marketing activities	4	1.3%	9	2.8%	87	27.3%	151	47.3%	68	21.3%
Increase sales	1	0.3%	5	1.6%	106	33.2%	169	53.0%	37	11.6%
Market participation	1	0.3%	8	2.5%	106	33.2%	155	48.6%	48	15.0%
Profit margin on sales	2	0.6%	7	2.2%	107	33.5%	146	45.8%	52	16.3%
The quality of our products and services	1	0.3%	10	3.1%	154	48.3%	95	29.8%	59	18.5%
Competitive position	3	0.9%	3	0.9%	121	37.9%	131	41.1%	59	18.5%

In terms of organizational performance, we see that Kosovar companies attach importance to marketing activities, most of them have realized an increase in sales and an increase in market participation.

Also, for the quality of the products, the profit margins on sales and the competitive position, most say that it is increasing.

Hypothesis testing

H0: The use of flexible remuneration practices has an impact on the subjective performance of the enterprise

H1: The use of flexible remuneration practices has no impact on the subjective performance of the enterprise.

To prove the above hypothesis, we used linear regression, while the purpose of this analysis is to prove the impact of human resources practices on the subjective performance of the enterprise, namely on the individual, group, and organizational level.

Table 8. *Linear regresion: Flexible reward and subjective performance*

Independent Variables	Individual subjective performance				Group subjective performance				Organizational subjective performance			
	B	S.H.	*B*	*Sig.*	B	S.H.	*B*	*Sig.*	B	S.H.	*β*	*Sig.*
Flexible reward	.109	.072	.081	.132	-.227	.082	-.148	.006	.142	.060	.140	.018
R	.630**				.633**				.515**			
R^2	.396				.401				.265			
ΔR^2	.383				.387				.248			
F	.29.167				29.717				16.019			
ANOVA (Sig.)	.000				.000				.000			
Dependent variable	***Subjective performance / individual***				***Subjective performance / group***				***Subjective performance / organizational***			

Source: *Author*

The above results show that on individual subjective performance, flexible reward practices have a significant impact (B=.109, S.H.= .072, β = .081) with high positive correlation .630**, regression R^2=.396, Δ R^2=.383, F test of statistical significance = 29.167 and p value= .000 which is significant at 1% confidence level.In the subjective group performance, we see that the flexible reward has a statistically significant impact (B=-.227, SH=.082, β = -.148 and p value =.006 > 1%), with a high positive correlation of .633 **, R^2 = .401, ΔR^2 = .387, the test of statistical significance F = 29.717 and p value =.000 which is significant at 1% confidence level.On subjective organizational performance, flexible reward practices were shown to have significant impact (B=.142, SH=.060, β = .140 and p value =.018 < 5% with high positive correlation .515**, regression R^2= .265, as well as ΔR^2 = .248, F test of statistical significance = 16.019 and p value =.000 which is significant at 1% confidence levelBased on the results presented above, we conclude that the hypothesis (H0) is supported and we say that the use of the practice of flexible remuneration has a statistically significant partial or partial impact on individual, group and organizational subjective performance at 1% and 5% of the reliability level.

Discussion and conclusion

The results of flexible remuneration as a practice of human resources, show that 80% of Kosovar enterprises decide the compensation based on the competence and ability of the employees, and link it directly to the performance of the employee.

Our results turned out to be similar to the research conducted in Croatia by Svetlik I. et al (2010), who showed that the Croatian compensation system is based on workplace evaluation

and varies depending on the complexity of the work and the points awarded. . Points are added at a rate of 0.5% for each year of work.

The results showed that on individual subjective performance, the practices that have a statistically significant impact are recruitment and selection (B=.220, SH=.056, β = .224 and p value =.000 < 1%), two-way communication (B=.137, SH=.047, β = .155 and p value =.004 < 5%), equality B=.289, SH= .047, β = .327 and p value=.000 < 1%) and job stability (B=.411, SH=.061, β = .348 and p value =.000< 1%) which are significant at 1% and 5% of the reliability level, with high positive correlation. 630**, regression R^2=.396, ΔR^2=.383, F test of statistical significance = 29.167 and p value= .000 which is significant at 1% confidence level.

On the subjective group performance, we see that the flexible reward has a statistically significant impact (B=-.227, SH=.082, β = -.148 and p value =.006 > 1% with a high positive correlation of .633* *, R^2 = .401, ΔR^2 = .387, the test of statistical significance F = 29.717 and p value =.000 which is significant at 1% confidence level.

On subjective organizational performance, flexible reward practices were shown to have significant impact (B=.142, SH=.060, β = .140 and p value =.018 < 5% with high positive correlation .515**, regression R^2= .265, as well as ΔR^2 = .248, F test of statistical significance = 16.019 and p value =.000 which is significant at 1% confidence level.

These results obtained from the second and third hypothesis are in accordance with the research of Triguero et al. (2012) who found that human resource policies and practices followed by firms have positive effects on organizational performance (subjective and financial), when they pursue the achievement of employee engagement.

Their confirmed hypotheses have shown the strategic character of HRM and its impact on financial and subjective performance. Their results reveal positive effects between the orientation of HR practices that require employee engagement and managers' perception of subjective performance (0. = 0.696; p < .001), as well as financial performance (ß = 0.199; p <.1).

Reference

1. Ali, R. and Ahmed, M.S. (2009) The Impact of Reward and Recognition Programs on Employee's Motivation and Satisfaction: An Empirical Study. International Review of Business Research Papers, 5, 270-279.
2. Anderson, K. and McAdam, R. (2004) A Critique of Benchmarking and Performance Measurement: Lead of Lag? Benchmarking: An International Journal, 11, 465-483. https://doi.org/10.1108/14635770410557708
3. Bassioni, H., Price, A., and Hassan, T. (2004). "Performance Measurement in Construction." J. Manage. Eng., 2(42), 42-50.
4. Bowen, D. E. and Ostroff, C. (2004). Understanding HRM-Firm Performance Linkages: The Role of the "Strength" of the HRM System. Academy of Management Review, 29, 203-221. https://doi.org/10.5465/amr.2004.12736076
5. Dewhurst, M. (2010) Motivating People: Getting Beyond Money. Business Source Complete, Ipswich.
6. Delery, J.E. and Doty, D.H. (1996) Modes of Theorizing in Strategic Human Resource Management: Test of Universalistic, Contingency, and Configurational Performance Predictions. Academy of Management Journal, 39, 802-835.http://dx.doi.org/10.2307/256713
7. Hoque, Z. (2004) A Contingency Model of the Association between Strategy, Environmental Uncertainty and Performance Measurement: Impact on Organizational Performance. International Business Review, 13, 485-502.https://doi.org/10.1016/j.ibusrev.2004.04.003
8. Kerlinger, F.N. (1986) Foundations of Behavioral Research. 3rd Edition, Holt, Rinehart and Winston, New York.

9. Lin, H.-F. (2007) Knowledge Sharing and Firm Innovation Capability: An Empirical Study. International Journal of Manpower, 28, 315-332. https://doi.org/10.1108/01437720710755272
10. Maslow, A. H. (1943). A Theory of Human Motivation. Psychological Review, 50, 370-396. https://doi.org/10.1037/h0054346
11. Mahaney, R.C. and Lederer, A.L. (2006) The Effect of Intrinsic and Extrinsic Rewards for Developers on Information Systems Project Success. Project Management Journal, 37, 42-54
12. Mottaz, C.J. (1988) Determinants of Organizational Commitment. Human Relations, 41, 467-482. http://dx.doi.org/10.1177/001872678804100604
13. Monica Franco-Santos & Luis Gomez-Mejia (2015). Reward Systems. Wiley Encyclopedia of Management. Edition: 5th. Publisher: Wiley.
14. Marr, R.A. et al. (2003) Neprilysin gene transfer reduces human amyloid pathology in transgenic mice. The Journal of Neuroscience, 23, 1992-1996.
15. Minbaeva, D. (2005) HRM Practices and MNC Knowledge Transfer. Personnel Review, 34, 125-144. http://dx.doi.org/10.1108/00483480510571914
16. Porter, M.E. (1985) Competitive Advantage. Creating and Sustaining Superior Performance. Free Press, New York, 557 p.
17. Phang, C.W., Sutanto, J., Kankanhalli, A., Li, Y., Tan, B.C.Y. and Teo, H.H. (2006) Senior Citizens' Acceptance of Information Systems: A Study in the Context of e-Government Services. IEEE Transactions on Engineering Management, 53, 555-569. http://dx.doi.org/10.1109/TEM.2006.883710
18. Robbins, S.P. (2009) Essentials of Organizational Behavior. 8th Edition, Pearson Education, Inc., Prentice Hall, Diamond. (In Japanese)
19. Schuler, R.S. and Jackson, S.E. (1996) Human Resource Management: Positioning for the 21st Century. 6th Edition, West Publishing Company, New York
20. Stajkovic, A.D. and Luthans, F. (2003) Behavioral Management and Task Performance in Organizations: Conceptual Background, Meta-Analysis, and Test of Alternative Models. Personnel Psychology, 56, 155-194. http://dx.doi.org/10.1111/j.1744-6570.2003.tb00147.x
21. Torrington, D. & Hall, L. (2004) Personnel Management: HRM in Action. 3rd Edition, Prentice Hall, London.
22. Williamson, I. O., Burnett, M. F., & Bartol, K. M. (2009). The interactive effect of collectivism and organizational rewards on affective organizational commitment. **Cross Cultural Management, 16**(1), 28–43
23. Wang, Y. (2004). Observations on the organizational commitment of Chinese employees: comparative studies of state-owned enterprises and foreign-invested enterprises. International Journal of Human Resource Management, 15(4), 649-669.
24. Takeuchi Y, et al. (2007) Release of thioredoxin from Saccharomyces cerevisiae with environmental stimuli: solubilization of thioredoxin with ethanol. Appl Microbiol Biotechnol 75(6):1393-9
25. Triguero-Sánchez, R., Peña-Vinces, J.C., González-Rendón, M., & Sánchez-Apellániz, M. (2012). Human Resource Management Practices aimed to seek the commitment of employees on the financial and nonfinancial (subjective) performance in Spanish Firms: An empirical contribution. *Journal of Economics, Finance and Administrative*, 17(32), 17-30

ISBN: 978-2-931089-30-9

La transizione digitale: l'importanza dei cambiamenti

Eleonora DE LUCA*
PhD Candidate Unical - Italia

Abstract: Digital technologies are a powerful and remarkably effective means of relating, analyzing, and sharing heterogeneous and unrelated information to generate new knowledge and bring benefits to the companies present in the territory. From this point of view, the digital transition is such an important and complex subject that it cannot be analyzed only from the IT and engineering points of view. Digitalization is, in fact, an essential element for business continuity and the very survival of organizations. In particular, this paper aims to examine the impact of the digital transition on the way of doing business, focusing on the obstacles that Italian companies, especially SMEs, find and benefit from the application of this transformation. The focus is, as mentioned, on SMEs because they are present in greater numbers in Italy and because they are the ones who have the greatest difficulty in understanding the importance of the phenomenon. Trying to apply to your company the same strategies used by large multinationals can be a driving force not only for your company but for the entire economy. The aim is to review existing literature and try to obtain new evidence on the subject. The underlying hypothesis is to demonstrate that digitization should not be perceived as an economic burden but as an opportunity for growth and development. Indeed, the digital transition has allowed businesses to grow and expand in every corner of the world. Specifically, the work, firstly, offers a description of the general diffusion of the phenomenon; secondly, it shows the effects of the application of the digital transition through the deepening of the national literature and the analysis of a case study.
Strengthening the digital in companies, in particular SMEs, means not only improving their economic performance and productivity but also significantly contributing to the economic development of the entire country system.

Keywords: Digital transition, change, SME, territory.

1. Introduzione

Il periodo di crisi pandemica ha portato le imprese ad adattare i processi industriali alla digitalizzazione dove velocità ed efficienza ricoprono ruoli fondamentali, permettendo così di comprendere come gli investimenti in tecnologie digitali conducono a benefici molto più ampi di quelli che ne hanno motivato l'acquisizione. In particolare, digitalizzare significa abbandonare ***gli strumenti tradizionali,*** cosiddetti analogici, al fine di snellire i flussi di lavoro e automatizzare attività e procedure. Si tratta di un percorso complesso che non si limita a potenziare i processi tradizionali, ma crea nuove forme d'innovazione caratterizzate da cambiamenti netti e rapidi che coinvolgono ogni segmento aziendale.

* Corresponding Author: eleonora.deluca05@gmail.com

Poiché il XXI secolo è considerato l'era del digitale, qualsiasi tipo di azienda che non adotti e modernizzi la propria organizzazione e strategie dovrà affrontare, inevitabilmente, la mancanza di interesse da parte degli stakeholder. Infatti, con l'avvento della digitalizzazione le relazioni tra le organizzazioni e i clienti si modificano e i modelli di business vengono reinventati. Nell'economia di oggi l'IT (Information Technology) è in continua evoluzione e le aziende devono, quindi, essere in grado di mutare costantemente in risposta ai cambiamenti della tecnologia stessa e del mercato (Zhang et al., 2017). Sono necessari elementi quali rapidità, flessibilità e agilità nell'adeguarsi ai cambiamenti proposti dal mercato così da poter perseguire nuove opportunità di business.

2. La transizione digitale

La transizione digitale si configura come una grande fase di trasformazione economica e sociale, erede delle diverse rivoluzioni industriali avvenute nel corso dei secoli. Si tratta di un processo di cambiamento ed evoluzione, una vera e propria metamorfosi. Nello specifico, esiste una differenza tra digitalizzazione e trasformazione digitale: la prima è parte della seconda con l'intento di dematerializzare i processi e permettere così una gestione automatica di quest'ultimi, migliorandone l'efficienza. In ambito aziendale, se la digitalizzazione ha luogo con investimenti in strutture ICT e in sistemi informativi, la trasformazione digitale è possibile solo quando si è in grado ridefinire e riallineare i processi e la propria struttura organizzativa.

Attualmente, la trasformazione digitale sta sconvolgendo le aziende in ogni settore, abbattendo le barriere tra persone, aziende e cose con conseguenze importanti in tutta la società contemporanea. Infatti, l'avvento e la diffusione di Internet rappresenta un motore dello sviluppo economico e ha imposto, inevitabilmente, un ripensamento delle strategie aziendali modificando anche il modo di comunicare delle aziende.

La transizione digitale industriale rappresenta oggi una grande opportunità di crescita ma anche una significativa sfida sia per le imprese che per il mercato del lavoro. Non è un caso che il Piano Nazionale di Ripresa e Resilienza (PNRR) ha riservato alla transizione digitale il 27% delle risorse totali, di cui più della metà sono messe a disposizione per potenziare le imprese e promuovere lo sviluppo e la competitività del sistema produttivo italiano. Anche la strategia Italia digitale 2026 include importanti investimenti per garantire la copertura di tutto il territorio con reti a banda ultra-larga, condizione necessaria per consentire alle imprese di catturare i benefici della digitalizzazione.

In particolare, i cambiamenti a livello aziendale riguardante la digitalizzazione si riferiscono ai prodotti, processi e competenze. Tuttavia, per permettere a questa trasformazione di avere successo è necessario che l'azienda disponga di risorse finanziarie sufficienti. La difficoltà della transizione digitale è accentuata dal fatto che, diversamente dalle grandi trasformazioni del passato, non esiste un settore di attività nel quale trasferire il surplus dell'innovazione. Per questo motivo, la crescente importanza dell'innovazione e degli intangibili ha indotto alcune aziende a perseguire una strategia incentrata su questi tipi di attività. Nello specifico, le aziende tendono a centralizzare il processo decisionale e la ricerca e sviluppo nelle sedi centrali mentre esternalizzano i processi di produzione. Questa divisione crea, in tal modo, opportunità per altri fornitori con capacità specializzate di entrare nella catena del valore, di sviluppare e scambiare esperienze e know-how, permettendo maggiori guadagni dall'innovazione così da rendere efficaci le strutture delle loro organizzazioni.

2.1 Le rivoluzioni industriali

Con il termine *Prima Rivoluzione Industriale* si vuole intendere il complesso di cambiamenti economici, scientifici, sociali e tecnologici avvenuti dalla metà del Settecento all'inizio dell'Ottocento (Fancello, 2019). Nello specifico, le novità hanno riguardato la macchina a vapore

messa a punto per la prima volta da James Watt nel 1775 e il filatoio meccanico introdotto da Arkwright nel 1979. Si passa, quindi, da un sistema agricolo ad un sistema industriale.

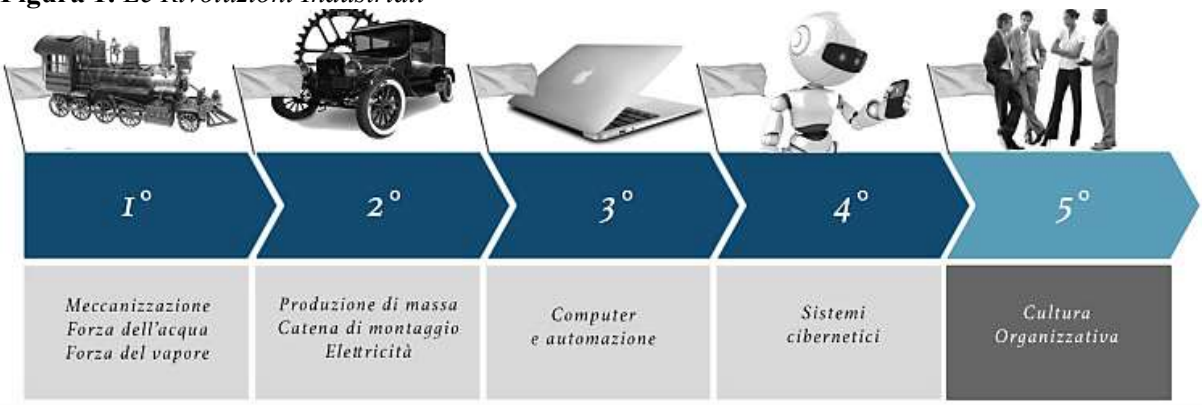
Seguì la *Seconda Rivoluzione Industriale* nel 1870 con l'introduzione dell'elettricità e del petrolio come nuove fonti energetiche. L'elemento caratterizzante questa nuova fase industriale fu l'introduzione della produzione di massa e della catena di montaggio.

Quando si iniziò a parla di robot e computer era, ormai, in atto, invece, la *Terza Rivoluzione*.

La *Quarta Rivoluzione* definita "The Fourth Industrial Revolution" (iniziata intorno al 2012 e ancora in atto) è contraddistinta da connessioni tra sistemi fisici e digitali, analisi complesse attraverso i Big Data, adattamenti real-time, utilizzo di macchine intelligenti, interconnesse e collegate ad internet (Schwab 2016).

In Italia il termine quarta rivoluzione industriale è stato ripreso all'interno del documento "Industria 4.0" (I4.0) dal Ministero dello Sviluppo Economico e fissa i seguenti obiettivi: investimenti privati nelle tecnologie, beni e sistemi; sviluppo delle competenze digitali; maggiori strumenti di finanziamento pubblico e privato finalizzati al finanziamento di start-up e spin-off. Essa ha portato considerevoli vantaggi, come l'aumento della qualità e riduzione del tempo necessario a far giungere un'innovazione sul mercato, l'aumento della produttività in termini di flessibilità e di efficienza (Pellerino, 2019).

Figura 1: *Le Rivoluzioni Industriali*



Fonte: https://performant.it/dalla-rivoluzione-industriale-alla-rivoluzione-comportamentale

Nella Fig.1 sono presenti i passaggi fondamentali delle Rivoluzioni industriali. È di fondamentale importanza parlare della Quinta Rivoluzione Industriale denominata "Industria 5.0" o della "personalizzazione" la quale s'incentrerà sulla "collaborazione tra macchina e uomo" in modo da far lavorare armoniosamente l'intelligenza artificiale con quella umana. Essa rappresenta la naturale continuazione ed evoluzione dell'Industria 4.0 e che si basa su concetti ancora insoliti, soprattutto per le PMI, di digitalizzazione e automatizzazione dei processi produttivi.

Nello specifico, non si tratterà tanto di una rivoluzione tecnologica ma piuttosto culturale e presterà attenzione alle persone e all'ambiente. Al centro del processo di produzione, quindi, si pone la qualità della vita e la sostenibilità. Ed infatti, l'Industria 5.0 ha l'obiettivo di rendere le aziende co-responsabili del benessere della società e dello stesso pianeta, aumentando il grado di attrattività delle imprese sia per gli investitori che i consumatori.

2.2 La digitalizzazione delle PMI

Con il termine "evoluzione digitale" o "digital transformation" ci si riferisce ad un tema di ampio respiro, individuando "un insieme di cambiamenti prevalentemente tecnologici, culturali, organizzativi, sociali, creativi e manageriali, associati con le applicazioni di tecnologia digitale, in tutti gli aspetti della società umana" (Stolterman e CroonFors, 2004). Così come definita finora, dunque, la trasformazione ha bisogno di importanti investimenti e di un ripensamento delle attività produttive insieme ad un riposizionamento dei ruoli operativi. Il maggior

impatto che ha avuto la transizione digitale sul modo di fare business al giorno d'oggi risiede nel concetto di "economia globale" che ha permesso alle imprese di crescere ed espandersi in ogni angolo del mondo. Oggi anche imprese molto piccole possono così arrivare in mercati specifici anche molto lontani in termini geografici.

Nella nostra economia la quota di piccole e medie imprese presenti sul territorio italiano è notevolmente superiore rispetto a quella di altre realtà, collegate tra loro con modalità e profondità completamente diverse. Esse ricoprono un ruolo chiave poichè impiegano l'82% dei lavoratori e rappresentano il 92% delle imprese attive. In particolare, sono considerate PMI, in base alla classificazione della Commissione Europea, le imprese che hanno meno di 250 dipendenti, il cui fatturato annuo non supera i 50 milioni di euro oppure il cui totale di bilancio annuo non supera i 43 milioni di euro.

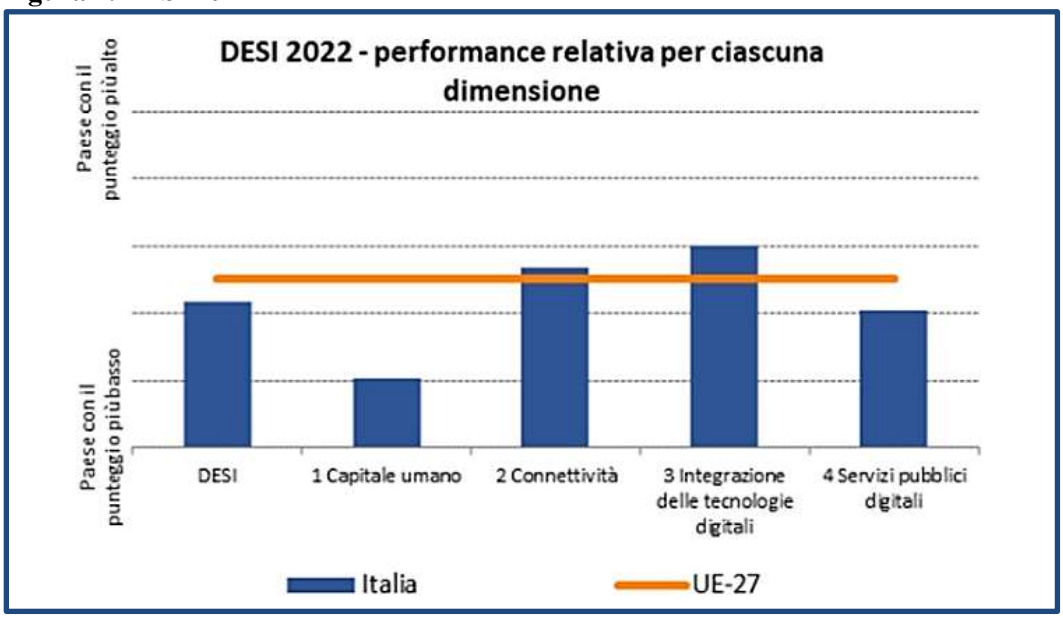
Numerosi sono gli studi incentrati sull'implementazione e sull'applicazione delle tecnologie digitali nelle aziende di grandi dimensioni, mentre sono assolutamente scarsi gli studi incentrati sulle PMI.

Le cause di forza maggiore che ostacolano maggiormente la trasformazione digitale delle PMI rispetto alle grandi imprese sono rappresentate da una cultura manageriale più attenta al consolidamento che non allo sviluppo dell'azienda, una mancanza di profili interni all'impresa con competenze digitali avanzate e scarse capacità di investimento. In particolare, ad incidere sul ritardo della trasformazione digitale nelle PMI è il fattore culturale perché esiste ancora una certa avversione al cambiamento dovuto anche a motivazioni di carattere economico. Gli imprenditori sono prudenti nei confronti di proposte, anche istituzionali, di grandi rivoluzioni dietro alle quali spesso si nascondono nuovi oneri. Il processo di trasformazione digitale infatti non è gratuito, ma comporta delle spese e per tale motivo non risulta affatto semplice la decisione di investire tempo e risorse.

2.3 Indici di digitalizzazione

Numerosi sondaggi e statistiche mostrano un quadro dell'Italia critico, ben al di sotto degli standard europei. Infatti, si rileva un approccio ancora frenato nei riguardi dell'innovazione, limitandosi all'adozione di singole soluzioni più che a una intensa trasformazione. Si nota, infatti, dall'indice DESI (Digital Economy and Society Index) come il processo di digitalizzazione sia ancora lontano con l'Italia che, nel 2022, occupa il diciottesimo posto sui 27 Paesi membri, migliorando due posizioni rispetto all'anno precedente ma restando ancora al di sotto della media europea.

Figura 2. *DESI 2022*



Fonte: https://digital-strategy.ec.europa.eu/en/library/digital-economy-and-society-index-desi-2022

Nello specifico, il DESI è l'indice di digitalizzazione dell'economia e della società che viene pubblicato dalla Commissione europea annualmente. Esso si compone di cinque aree che rappresentano l'insieme di 30 indicatori suddiviso in:

- *Connettività:* estensione, velocità e attendibilità della banda larga in ciascun Paese;
- *Capitale umano/Competenze digitali:* competenze necessarie per sfruttare una società digitale;
- *Utilizzo di Internet:* attività svolte dai cittadini online.
- *Integrazione della tecnologia digitale:* integrazione delle principali tecnologie digitali nelle aziende
- *Servizi pubblici digitali*: come l'e-government e la sanità digitale.

Come mostrato nella Fig. 2, fortemente critico è l'indicatore riguardante il capitale umano nettamente al di sotto della media, a seguire l'indice sui servizi pubblici digitali. Nel complesso l'Italia non riesce ancora ad avere la visione, la cultura e le competenze affinché gli investimenti possano portare a un effettivo ritorno economico e a benefici di lungo periodo.

Anche il Digital Transformation Scoreboard, promosso dall'Agenzia Europa per le Piccole e Medie Imprese (EASME), conferma attraverso due indici che le performance dell'Italia non sono affatto brillanti. Il primo indice il Digital Technology Integration Index (DTII), prende in considerazione: numero di PMI che vende online; numero di PMI che esportano in altri stati europei tramite e-commerce; percentuale di turnover delle PMI dall'e-commerce; numero di imprese che si avvale di 2 o più social media; numero di imprese che invia fatture in formato standard; numero di imprese che compra almeno un servizio di cloud computing; numero di imprese che si serve di un software ERP (per la pianificazione delle risorse aziendali); numero di imprese che utilizzano la tecnologia RFID nei loro processi di produzione e/o consegna.

Mentre il Digital Transformation Enablers' Index (DTEI), tiene conto dei seguenti fattori: infrastruttura digitale; e-Leadership; investimenti e accesso ai finanziamenti; cultura imprenditoriale; domanda e offerta di competenze digitali.

L'Italia è, quindi, in ritardo rispetto agli altri paesi in termini di digitalizzazione la cui causa deriva da una bassa convenienza economica ad investire in infrastrutture e una scarsa alfabetizzazione informatica delle persone, inclusi manager e imprenditori.

3. Caso studio: Vodivì s.r.l.

Solo le aziende agili ed efficienti sono in grado di affrontare le sfide di un mondo ormai completamente tecnologico e digitale. Un esempio è Vodivi', fondata nel 2015 con sede a Spoleto in provincia di Perugia appartenente al settore del Fashion Tech. Essa è riuscita ad interpretare correttamente il concetto di digitale e la cultura che il digitale porta con sé. Infatti, oltre a creare, disegnare e realizzare collezioni di borse e accessori, interamente Made in Italy, che valorizzano luoghi, territori e arte italiana utilizza l'innovazione e le tecnologie digitali, ponendo particolare interesse verso i clienti e l'ambiente.

L'idea alla base dell'impresa è quella di una moda unica, innovativa e originale, perfettamente in linea con il mercato post Covid-19. A differenza dei suoi concorrenti, Vodivì offre al mercato prodotti fortemente identitari, senza tempo, personalizzabili perché ogni articolo è diverso dall'altro così da creare una forte partecipazione e coinvolgimento da parte del cliente.

Vodivì ha adottato un semplice ma efficace ed innovativo modello di business, che permette di arrivare a mercati nazionali e internazionali, senza particolari investimenti. Infatti, per la produzione si utilizzano moderni macchinari per il taglio e la prima fase di lavorazione mentre viene esternalizzata l'assemblaggio e la cucitura ad artigiani esterni. Il canale delle vendite fa affidamento alla piattaforma e-commerce con showroom virtuale e presentazione delle borse in 3D, ma non mancano negozi fisici così da aumentare la riconoscibilità e consolidare il posizionamento strategico del marchio.

I principi alla base dell'impresa Vodivì sono 3 riassumibili in:

- La tradizione artigianale che realizza oggetti belli, unici, di alta qualità e senza tempo;
- La storia, l'arte, la cultura, il territorio e la gastronomia italiana;
- L'opportunità dei clienti di partecipare alla vita dell'azienda in tutti i suoi aspetti, dalla ideazione del prodotto insieme alla stilista fino all'acquisto grazie all'uso delle tecnologie digitali.

Tutto questo ha permesso al marchio di espandersi ed essere conosciuto a livello nazionale ed avere sbocchi in mercati internazionali.

4. Conclusioni

Le PMI italiane oggi sono il cuore pulsante del nostro tessuto economico e negli ultimi anni hanno compreso, con maggior consapevolezza, l'importanza dell'implementazione del digitale, sebbene si fatichi ancora a comprendere la portata della trasformazione digitale. Le PMI affrontano maggiori difficoltà nell'attuare la trasformazione digitale a causa dei fattori elencati precedentemente come: budget limitati, conoscenze insufficienti, disinformazione da parte dell'imprenditore, a volte limitato dalla sua esperienza, ecc. (Javaid et al., 2017; Zhang et al., 2018). Tuttavia, l'analisi del caso studio ha evidenziato una serie di buone pratiche comuni che consentono alle attività di divenire motori di sviluppo del business dell'impresa, impattando positivamente su un percorso di crescita sostenibile e consapevole. Le aziende digitalizzate sono diverse dalle aziende tradizionali in quanto hanno un diverso insieme di mentalità, abilità, dati, processi, strutture, ecc. Le aziende digitali respirano il mondo dei loro clienti, pensano e agiscono dal punto di vista del cliente, la loro prospettiva è outside-in. Esse sono in grado di comprendere che il loro mercato è definito dalle esperienze dei clienti e organizzano costantemente tutte le interazioni con questi, in conformità di tali requisiti guidano e organizzano così l'azienda. Ed è proprio quello che ha fatto Vodivì e che dovrebbero fare tutte le PMI che voglio restare competitive sul mercato. La transizione digitale, quindi, non deve essere considerata come un aggravio economico bensì come una rivoluzione indispensabile per poter pianificazione strategie tecniche ed organizzative efficaci che migliorano la produttività dell'impresa e favoriscono lo sviluppo economico del paese.

Riferimenti bibliografici

- Caso studio: Vodivì s.r.l. disponibile su startup e PMI innovative, profilo dell'impresa ICARRY SOCIETA' A RESPONSABILITA' LIMITATA (registroimprese.it) e VODIVÌ (vodivi.com)
- Fancello L., Accenni di storia: la Prima rivoluzione industriale, Close-up engineering, Daily Finance Magazine, 2019. Disponibile su https://financecue.it/primarivoluzione-industriale
- Focus Italia digitale 2026, Il Piano nazionale di ripresa e resilienza, Ministero per l'innovazione tecnologica e la transizione digitale, giugno 2021 consultabile su: https://innovazione.gov.it
- Industrial Revolution - From Industry 1.0 to Industry 4.0. Desoutter Industry 4.0. Disponibile su https://www.desouttertools.com/industry-4- 0/news/503/industrial-revolution-from-industry-1-0-to-industry-4-0
- Javaid A., Kurjakovic S., Masuda H. e KohdaY., Enabling Digital Transformation in SMEs by Combining Enterprise Ontologies and Service Blueprintin. Japan Advanced Institute of Science and Technology, University of Camerino, 2017.
- Kotarba M., Measuringdigitalization–key metrics. Foundations of Management, 2017. Disponibile su https://content.sciendo.com/view/journals/fman/9/1/article-p123.xml

- La digitalizzazione delle imprese italiane: efficienza,innovazione e conquista di nuovi mercati. Osservatorio Unicredit piccole imprese. IX edizione. 2012 Disponibile su: http://firstonline.info/news/files/658.pdf
- Matt C., Hess T. e Benlian A., Digital Transformation Strategies, Business & Information Systems Engineering vol. 57, 2015. Disponibile su https://www.deepdyve.com/lp/springer-journals/digital-transformation-strategiesBbKxORstbB
- MBNEWS (2019) Le PMI sono il 92% delle imprese attive in Italia, ma c'è ancora poca digitalizzazione [blog].25 luglio. Disponibile su https://www.mbnews.it/2019/07/lepmi-sono-il-92-delle-imprese-attive-in-italia-ma-ce-ancora-poca-digitalizzazione/
- Papadopoulos T., ET AL. The use of digital technologies by small and medium enterprisesduring COVID-19: Implications for theory and practice. International Journal of Information Management, 55, 102192, 2020
- Pellerino A., La Trasformazione Digitale nelle Piccole e Medie Imprese, Torino: Dipartimento di Ingegneria Gestionale della produzione, Politecnico di Torino, 2020.
- Rullani F., Rullani E., Dentro la rivoluzione digitale. Per una nuova cultura dell'impresa e del management. Giappichelli Editore, 2018
- Söderholm P., Parida V., Johansson J., Kokkola L., Öqvist A. e Kostenius C., AddressingSocietal Challenges, 2018. Disponibile su http://www.divaportal.org/smash/get/diva2:1186649/FULLTEXT01.pdf
- Tassari F., Come favorire la digitalizzazione aziendale e perché farlo, Enter Software Innovation, 2020. Disponibile su https://www.entersoftware.it/incentivi-digitalizzazione-aziendale/
- Vitaliano V., Digitalizzazione e Responsabilità sociale, SSI, Fiera Milano media, gennaio febbraio 2021
- Zhang W., Li L., Su F. e Mao J-Y. Digital transformation by SME entrepreneurs: A capability perspective. Info Systems J. 2018. Disponibile su https://onlinelibrary.wiley.com/doi/full/10.1111/isj.12153

ISBN: 978-2-931089-30-9

Digital and ecological transition: the two sides of the same coin. A brief overview

Raffaella GIRONE*
University of Bari Aldo Moro- Italy

Abstract: Starting from the assumption that sustainability, respect for the environment, energy saving and digital transition are an imperative for the protection of our planet, the objective of this paper is to highlight links between sustainable processes and digital transition. The dual transition – green and digital – is considered a source of growth and competitiveness for all sectors. The concept that companies must be more innovative and sustainable, through new technologies, is a concrete need. Green and digital solutions thus become two sides of the same coin, tools for intervention for industry and business. The European Commission has long promoted digital transformation as a solution that can improve the economic competitiveness of companies, through digitalization processes capable of making sustainability objectives concrete and enabling the changes necessary for a just green transition. The international community is actively implementing programs aimed at achieving the objectives of safeguarding and prospering society and the environment set out in the 2030 Agenda. The European Union has adopted an action plan, the Green Deal, which provides for the acceleration of the Green Transition as a fundamental engine for the development of an efficient, sustainable, fair, and inclusive society.
The implementation of these objectives and the goal of climate neutrality by 2050 constitute a common mission for all sectors of the economy, which will have to focus on environmentally friendly technological investments, eco-sustainable innovations, cleaner forms of private and public transport, the decarbonisation of the energy sector, the construction of efficient buildings in all their aspects, on working together to improve current environmental standards. Considering the limits dictated by the current energy crisis, which is putting the fate of many companies at risk, the coordination of sustainable strategies and digitalization represents an even more pressing challenge.
This study, trying to identify the best strategies suitable to make the digital and ecological transition process concrete in a short time, aims at identifying the advantages and disadvantages for businesses.

***Key words*:** transition, sustainability, digitalization, green economy, energy crisis.

JEL classification: M15, O31, O13.

1. Introduction

The aim of this work is to demonstrate how sustainability, environmental respect, energy saving and eco-compatibility represent not anymore a choice, but an imperative that our planet imposes on companies.

A clean, green and responsible economy is not the result of an immediate and simple restructuring, but company's mission and vision must be pervaded by environmental responsibility, so

* Corresponding Author: raffaella.girone@uniba.it; Researcher in Business administration, Department of education, Psychology, Communication Sciences.

that the green interest can take on strategic value, and not mere compliance with rules and regulations, allowing companies to achieve competitive advantages above the average.

A few years ago, sustainability and innovation were considered opposite concepts by virtue of the fact that many innovative products had a negative impact on the environment and health.

Today, innovations can be a key element to improve the environment and determine the competitive advantage of companies. This implies developing both innovative and sustainable new business models, throughout the simultaneous combination of ecological and digital innovative processes.

2. The dual transition

The ecological and the digital transitions are the two key objectives that the EU member countries, including Italy, have decided to pursue, as they are considered fundamental to relaunch employment and the economy.

The close relationship between the two transition processes is now globally recognized as Twin revolution. There are numerous studies[1] affirming that digital technologies are a determining factor in the success of conversion processes, aimed at greater sustainability of production systems.

In fact, they make it possible to plan a series of investments capable of giving a new impetus to enterprises and their production. A role that is not only revealed in the environmental dimension of sustainability, but that looks at a transformation of the entire business system, also affecting organizational models with a view to greater social responsibility, inclusion, and diversity.

The dual transition – green and digital – is considered as one of the cornerstones of the post-Coronavirus recovery, as well as a source of growth and competitiveness for all sectors.

The orientation of companies to become more innovative and sustainable by investing in new technologies, is now not only a widespread thought, but a concrete need, so that green and digital solutions become two sides of the same coin.

The European Commission has long promoted digital transformation as a solution to the economic competitiveness of companies' improvement, through digitalization processes that enable the realization of the sustainability objectives and of the changes necessary for a green transition (New Industrial Strategy for Europe 2021)[2].

New technologies can improve energy efficiency, boost the circular economy, ensure better allocation of resources, but also reduce emissions, pollution, biodiversity loss and environmental degradation of a company. The European Union, with the aim of promoting and accelerating the digital transition, has planned several programs, such as Horizon Europe, Next Generation EU, which must however be integrated by the Member States and the private sector, with investments in research and innovation.

As far as Italy is concerned, the Government has decided to intervene with investments and partial measures in favor of climate neutrality and the green and digital transformation of the business sector, included in the National Recovery and Resilience Plan (PNRR)[3]. The main objective of this program is to accelerate the transition to a green and circular economy, to achieve climate neutrality and digitalization, making Italian companies more sustainable and competitive.

[1] Among them: ***"The Challenges of Digital Sustainability"*** created by Ipsos and commissioned by Maker Faire Rome and UniCredit, 2021.

[2] https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/european-industrial-strategy_en

[3] With the ***Next Generation EU***, the digital transition is closely accompanied by the "Green Revolution and Ecological Transition". The last one foreseen in ***Mission 2 of the PNRR*** allocates 69.94 billion euros out of a total of 235.12, for renewable sources and sustainable mobility (to these are to be added the 31.46 billion foreseen in Mission 3 "Infrastructures for sustainable mobility").

To achieve the EU 2050 objectives, companies have to invest in digitalization. But in what does this process consist of?

3. Digital transition: the starting point

Digital transformation is a process that uses digital technologies to create new, or modify existing business processes, culture, and customer experiences. Digital technologies present an enormous growth potential for Europe, therefore the European Commission, supports Member States carry out reforms to unlock digital growth potential, to deploy innovative solutions for businesses and citizens, and to improve the accessibility and efficiency of public services.

In this direction, relevant funds have been allocated for professional training, in particular STEM (Science, Technology, Engineering, Mathematics), and to digitize companies, public administration, healthcare, business processes and training, and the growth of ultra-broadband networks, especially 5G and fiber[4].

Digitalization is essential not only to improve business efficiency, but also to enhance the complementary ecological transition programs.

To digitize means to simplify, automate, dematerialize, adopt data-driven processes, optimize, save, make more efficient, gain competitiveness.

The main advantages for companies coming from this process are:

1. Efficiency: digitalization is usually accompanied by an increase in the overall performance of machinery and production plants, a reduction in consumption, and the optimization of stocks.
2. Business continuity: digitized processes are the foundation of business continuity, i.e., the company's ability to continue to carry out its activities even in front of adverse events.
3. Agility: the digitalization of processes ensures companies, and SMEs in particular, the ability to quickly adapt the business to the variability of market demand and the evolution of the competitive environment.
4. Competitiveness: e-commerce and online business represent a boost, an accelerator of internationalization and expansion processes in new markets.
5. Collaboration: digitizing means putting employees and managers, but also supply chain partners, in a position to collaborate in a profitable way, often in real time.
6. Resilience: the pandemic has forced many SMEs to rethink inventory management and the entire supply chain set-up. The pervasive digitalization of business processes makes supply chain relationships more transparent and fluid, also enabling proactive management of possible interruptions.
7. Customer satisfaction: the digital transition improves the customer experience and, more specifically, facilitates and enables energy savings through smarter green efficiency programs; it greatly increases the ability of suppliers to interact with customers, reducing their costs.

The digital transition, as well as the ecological one, is not immediate and requires the overcoming of some obstacles. The main barriers to digitalisation are the lack of interoperability of existing digital systems, the lack of a data-driven (and AI-oriented) culture, the lack of internal expertise, uncertainty about legal responsibilities related to digitalisation, and the impact on corporate reputation.

These limitations are typical of small and medium-sized companies, almost always linked to a more reluctant mentality to change and a lack of funding.

[4] The data of the Digital Innovation Observatory in SMEs highlight how the most mature realities from the point of view of digitization obtain better economic and financial performance: + 28% of net profit, + 18% of profits, + 11% of EBITDA.

A study by Stanford University estimated the global cost for the 100% green energy transition with renewables at around 73 trillion dollars by 2050 (consider that the entire Italian GDP in 2019 is only 2 trillion euros)[5].

The cost of the energy transition for Italy could exceed 650 billion euros in the next ten years, although EU interventions aimed at financing companies for green conversion (for example Fit-for-55 climate package), and the energy transition represent only 6% of the total need. The remaining part of the 94% must be covered by companies' private funds.

The green energy relevant cost depends on its implementation that requires new technologies and infrastructures, to allow the transition to a totally decarbonized economy.

Part of the funds allocated by UE will have to support people losing their jobs as a result of the transition from diesel to electric, or from gas power plants to storage plants for renewables. On the other side, green energy, the circular economy and sustainability will also create new jobs[6].

Even if recycling help to reduce harmful emissions caused by various production activities, the conversion of materials involves energy consumption, and most of the electricity comes from non-renewable sources, the cost of which is very high, because of the current energy crisis.

The use of renewable sources does not solve the problem of higher costs because of the lack of raw materials, such as lithium, cobalt and nickel needed for electric car batteries, or silicon for solar panels, aluminum, steel, copper, or tin to solder the circuits, causes an increase in prices with direct effects on the cost of energy[7].

In conclusion, the green transition is more and more necessary, as enlightened by climate disasters, but it is not at all easy and it risks being slowed down or even compromised, if the consensus towards a circular economy is unanimous.

4. Green transition step

The ***ecological, or green, transition*** consists in launching a new economic, cultural and social system on a global scale, that respects the criteria of environmental sustainability. This green transition is at the heart of the ***United Nations 2030 Agenda***, which sets out in detail the urgent ecological measures required to combat climate change and protect the environment, including the reduction of greenhouse gas emissions, the decarbonization, the adoption of advanced technological solutions and the use of renewable energy sources.

Scientists say our planet is at great risk on two fronts: climate change and biodiversity loss.

They predict that the climate will increase on average by about 2 ° within the next 7 years: a risk that must be avoided through radical changes at the social and economic level. These changes will call into question years, decades and centuries of human choices that have caused damage to the earth's ecosystem and biodiversity.

Decisions concerning the transport sector, agriculture, construction, are all fields that need the ecological transition and therefore a real green revolution useful for improving the environmental situation on a global scale.

The Ministry of Ecological Transition has the specific function to deal with all the problems related to the energy sector, easing the transition from an economic and social model based on polluting energy sources to one that enhances natural capital, granting an economic profit in complete respect of the environment.

Some of the main areas interested by the ecological transition are:

[5] https://www.cell.com/one-earth/fulltext/S2590-3322(19)30225-8#%20

[6] Stanford University has calculated 29 million positions that will open in the world

[7] The cost of batteries, wind and photovoltaic plants has fallen for a decade. So far: 2021 marks double-digit increases

- The transport sector, which is one of the main contributors to climate change due to the continued use of fossil fuels such as oil and coal, is one of the leading causes of CO2 emissions into the atmosphere. If, on one hand, it is considered that electric mobility is stepping up to replace traditional means of transport, it must be considered that more than half of the electricity used is produced by thermal power stations burning fossil fuels. On this basis, huge investments have been made in renewable energy sources, such as wind turbines and hydro-electric plants. One of the main themes of the ecological transition is, in fact, decarbonization. This process aims to eliminate fossil fuels such as coal from production systems, encouraging the production of electricity with non-polluting renewable sources such as wind, sun and sea.
- Agriculture and livestock sectors are also among those that contribute to the increase in CO2 emissions, both through the use of machinery powered by petrol or diesel, both for the use of pesticides and insecticides, and for the strong alterations in biodiversity, caused by intensive farming that represent one of the first sources of CO2 emissions on the planet.
- Productive sector and circular economy: the goal of the economy is to extend the life cycle of products through recycling, with a positive effect not only on emissions, but also on waste reduction. In this case, in fact, the product that has finished its function is broken down with its materials, which are subsequently reintroduced into the economic cycle. The circular economy can potentially lead to the renewal of entire sectors, such as production or the new green building sector.

5. Ecological transition: the opportunities and limits for companies

The ecological transition is a revolution involving all organizations, which are obliged to review their processes in order to encourage low-impact activities, use alternative energies, and adopt circular economy strategies.

To boost the ecological transition of Italian companies, the EU has invested about 200 billion euros, funds that will be provided if used for achieving co2 equalization, and for the development of the digital economy by 2050.

At least 37% of these funds must be allocated to the ecological transition while the 20% addressed to the digital transformation.

Financial projects aim at:

- gradually reducing the use of fossil fuels;
- improving energy efficiency, which also includes the revaluation of buildings;
- using renewable energies and implement the hydrogen economy;
- increasing the use of electric vehicles in private and public transport;
- improving recycling and reuse capacity;
- protecting biodiversity ;
- fulfilling reforestation;
- implementing sustainable agriculture and livestock projects;
- reducing the use of plastics in favour of biodegradable materials has decreased.

The funds are provided with the aim not only to achieve environmental objectives, but above all to stimulate a growth perspective of companies through the revision of production processes based on interventions in contrast with climate change.

What will be the main advantages?

Companies will have to review their processes from an environmental point of view, supporting the creation of low-impact products and services.

This will determine a virtuous circle that will lead to new opportunities for employment, and growth of human resources, (part of the EU funding will be used to train the necessary skills that are missing in all sectors of the green economy).

The opportunities that a company can seize are:

- Assessment of the current state of environmental impact;
- Implementation of activities to start the process of reducing direct and indirect environmental impacts;
- Adoption of processes for the birth and reshaping of low-impact goods and services;
- Encourage the use of raw materials and green energy;
- Improve the skills of human resources;
- Reduce waste, sustaining the chain of recycling and reuse.

6. Success factors in support of the EU's green and digital transitions

According to the 2022 JRC report on green and digital transition[8], the two processes are strictly linked: for example, distributed ledger technology, which underlies blockchain and cryptocurrencies, are useful in material tracing, improving maintenance and recycling in circular economies, or digital twins can manage traffic to optimise its flow, reduce jam and consequently emissions.

On the other hand the two transitions can also be discordant: digitalisation is based on electricity, and several digital technologies are resource-intensive and create waste.

This implies that only through a proactive management and a set of requirements (social, technological, environmental, economic and political) the twin transition can be profitable and make concrete the 2050 EU goal: net zero emission.

The EU goal to be climate-neutral by 2050, meaning an economy with net-zero greenhouse gas emissions, constitutes the heart of the Eu Green Deal, in line with the EU's commitment to global climate action under the Paris Agreement.

The objective of achieving a climate-neutral society is both an urgent challenge and an opportunity to relaunch businesses, and all economic sectors will play a role – from the power sector to industry, mobility, buildings, agriculture and forestry.

The EU can lead the way by investing into realistic technological solutions, empowering citizens, and aligning action in key areas such as industrial policy, finance and research, while ensuring social fairness for a just transition.

The EU Commission's 2022 Strategic Forecast Report promotes the link between green and digital transition in the new geopolitical context. Their combination can be gained in various areas.

Digital technologies can help sectors with the greatest impact on the environment to become more sustainable: energy, transport, construction, industry, and agriculture. How it will be possible, is specified in the EU document, mentioning the opportunities for using digital twins, AI and blockchain.

The report highlights that digital technologies could play a key role in achieving climate neutrality, reducing pollution and restoring biodiversity (the European Union has planned for the period 2021-2027, an investment that exceeds two thousand billion euros; at least 30% will be spent on combating climate change, "the *highest share of the largest EU budget ever").*

The combination of digital transition and ecological transition is essential to achieve carbon neutrality by 2050. The report lists the contribution of digital technologies in achieving the

[8] JRC's "Towards a green and digital future - Key requirements for successful twin transitions in the European Union" Science for Policy, 2022.

goal: robotics and the Internet of Things could improve resource efficiency and strengthen the flexibility of systems and networks; Blockchain-based data management is an important option to drive progress towards a more circular economy; Digital product passports enable better traceability of materials, components and value chain and make data more accessible.

Then there are the digital twins that are able to foster innovation and the design of more sustainable processes, products or buildings.

To accomplish the 2050 targets, EU industry in Europe will have to cut CO2 emissions by 23% compared to 2015.

One of the first factors to act on is energy efficiency. The use of digital solutions to increase energy efficiency (smart meters, sub-meters, sensors) makes it possible to obtain real-time data on consumption and to manage energy consumption in a targeted manner.

Control, supervision, big data analytics systems will improve industrial process efficiency and process data to enable smarter decisions. The application of digital twins[9] will improve the design of systems and better manage their useful life, adopting predictive maintenance and extending the life of the plants, making them also less energy-intensive.

The same considerations can be extended to the construction and agriculture sectors, that will benefit from digital systems making their production processes more efficient and ecological.

Another example of a "green and smart" combination comes from the use of digital twins, which will provide data to manage product diversification and use functional biodiversity to redesign pest control. Satellite data, sensors, blockchains and data from across the value chain could increase traceability and transparency.

Ad hoc policies, by 2050, are needed to ensure that opportunities can be strengthened, and risks related to the interaction of digital transition and economic transition, can be reduced. The EU Commission's 2022 Strategic Forecast mentions ten basic actions in this regard:

the need to strengthen resilience and open strategic autonomy in critical sectors related to dual transitions, the need to promote the two transitions worldwide, the increase of autonomy at the level of raw materials, the reiteration of all the useful conditions for the transition to digital and green models to be a safe and inclusive opportunity, as well as sustainable.

Finally, more robust cybersecurity and data sharing framework are highlighted to unlock the potential of technologies combining green and smart factors.

If these actions are implemented, the EU Commission states that: "*by 2050, the twinning of digital and green transition will support a new, regenerative and climate-neutral economy, reducing pollution levels, restoring biodiversity and natural capital, thanks to sustainable digital technologies and other technologies". A transition that will benefit not only businesses but above all worldwide citizens.*

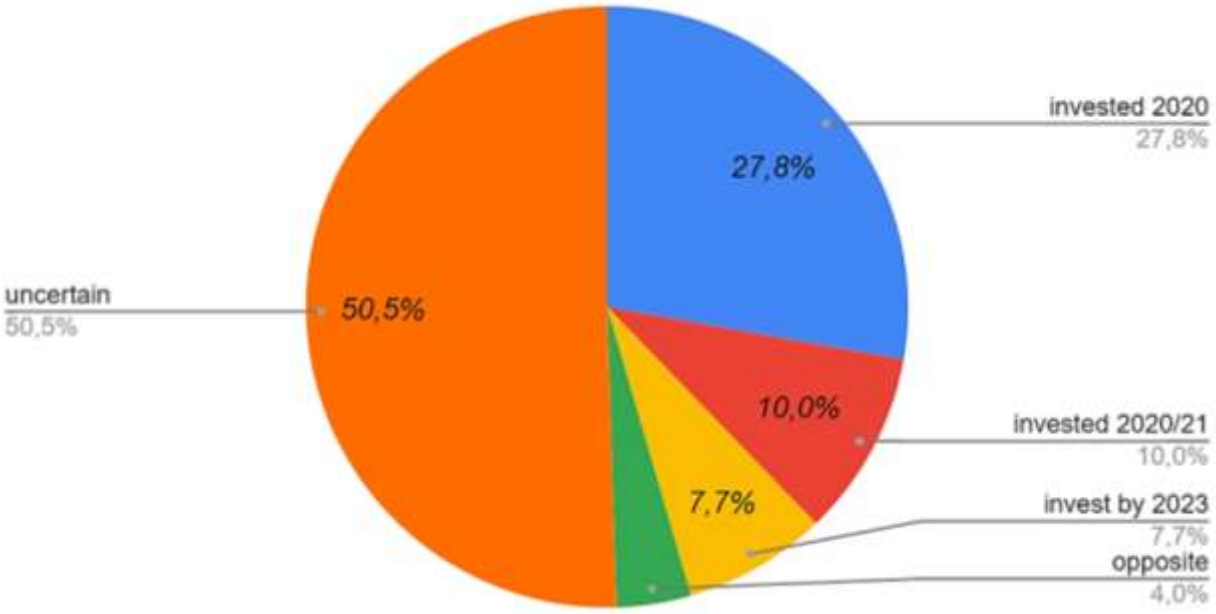
7. Italian companies facing the challenge of green transition

According to the Euler Hermes study, about half of Italian companies believe that the transition process towards a more sustainable economy has a positive effect on their business, which is why they have decided to invest concretely by shaping their processes, so that the entire business system greater attention to the issues of climate change and sustainability. Only 4% of companies believe that sustainable development can be a brake on growth [10].

[9] A digital twin is the virtual representation of a physical entity, living or non-living, of a person or of a complex system connected to a physical part and with which it can exchange data and information, both synchronously (in real time), and asynchronous (in later times).

[10] Data emerged from a study conducted by Euler Hermes with Format Research that has probed what they think and what they are doing in this regard Italian non-agricultural and non-financial companies with a turnover of at least 2.5 million euros.

The report shows that 37.8% of Italian companies have already started green investments, 27.8% had started before 2020, 10% started investing during the two-year periods 2020-2021, while 7.7% will do so by 2023.



Green investments are mainly made by large companies around (71.9%) especially manufacturing sector in northern Italy and tourist and hotel companies, many of which are present in the south. The reasons why companies have invested in green transition are:

- The possibility of accessing loans from credit institutions 3%
- The need to comply with Italian and international regulations (69.3%)
- Improving operational efficiency
- Lower costs
- Increase in turnover
- Climate change and environmental degradation 32.8%

Although there are several reasons that push companies to make sustainable choices, there is a unanimous thought that the green transition is involving very significant changes, with the concrete switch to low-consumption production processes and the opening towards a circular economy.

The results of the research on green transition highlight that the new growth model must be based on policies and investments for sustainability. The study also shows that Italian companies invest in green strategies because they are aware of the positive impact on environment and of the boomerang effect thanks to the consumer's approval; finally, the adoption of ESG parameters is an opportunity to change companies' offer. In other words, companies that adopt ESG parameters are truly competitive, pushing suppliers and other stakeholders to take the same path, thus determining a domino effect on the entire supply chain, establishing a virtuous circle with positive effects on the global market.

8. Final remarks

In conclusion, the challenge posed by the current energy crisis, the ongoing geopolitical conflict, climate change, environmental impact and limited natural resources calls for the search

for new technological solutions and new innovative tools compared to traditional ones. The digital and ecological transitions go hand in hand and must be considered as a ***major challenge***, i.e., a considerable effort made to address and solve a problem with a high societal impact, to experiment with the different possibilities and technological options that are envisaged, to assess the risks involved and to try advancing rapidly towards the triple objective of energy security, decarbonization and energy efficiency. There is no doubt that for the resolution of such a ***great challenge*** there is a need for a joint effort, ***primarily*** by scientists, researchers, politicians, officials, an extensive public-private partnership, at Community and national level, as well as the consensus of public opinion in general.

References

Stephanie S. Pane Haden, Jennifer D. Oyler, John H. Humphreys , *Historical, practical, and theoretical perspectives on green management: An exploratory analysis*, Management Decision, ISSN: 0025-1747, July 2009

Anderson, R.A. (2004), "*Climbing Mount Sustainability*", *Quality Progress*, Vol. 37 No. 2, pp. 32-7.

Banerjee, S.B. (1998), "*Corporate environmentalism: perspectives from organizational learning*", *Management Learning*, Vol. 29 No. 2, pp. 147-64.

Banerjee, S.B. (1999), "*Corporate environmentalism and the greening of strategic marketing*", in Charter, M. and Polonsky, M.J. (Eds), *Greener Marketing: A Global Perspective to Greening Marketing Practice*, Greenleaf Publishing, Sheffield, pp. 16-40.

Banerjee, S.B. (2001), "*Corporate environmental strategies and actions*", *Management Decision*, Vol. 39 No. 1, pp. 36-44.

Banerjee, S.B. (2002a), "*Corporate environmentalism: the construct and its measurement*", *Journal of Business Research*, Vol. 55 No. 3, pp. 177-91.

Banerjee, S.B. (2002b), "*Organisational strategies for sustainable development: developing a research agenda for the new millennium*", *Australian Journal of Management*, Vol. 27, pp. 105-17.

Borri, F. and Boccaletti, G. (1995), "*From total quality management to total quality environmental management*", *The TQM Magazine*, Vol. 7 No. 5, pp. 38-42.

Bradbury, H. and Clair, J.A. (1999), "*Promoting sustainable organizations with Sweden's natural step*", *Academy of Management Executive*, Vol. 13 No. 4, pp. 63-74.

Buchholz, R.A. (1993), *Principles of Environmental Management: The Greening of Business*, Prentice-Hall, Englewood Cliffs, NJ.

Costello, M.W. (2008), "*13 steps to 'green' your business*", *Business & Economic Review*, Vol. 54 No. 4, pp. 6-9.

Daly, H.E. (1996), *Beyond Growth*, Beacon Press, Boston, MA.

Darnall, N., Jolley, G.J. and Handfield, R. (2008), "*Environmental management systems and green supply chain management: complements for sustainability?*", *Business Strategy and the Environment*, Vol. 18 No. 1, pp. 30-45.

Denton, D.K. (1994), *Enviro-Management: How Smart Companies Turn Environmental Costs into Profits*, Prentice-Hall, Englewood Cliffs, NJ.

DuBose, J.R. (2000), "*Sustainability and performance at Interface, Inc.*", *Interfaces*, Vol. 30 No. 3, pp. 190-201.

Florida, R. and Davison, D. (2001), "*Gaining from green management: environmental management systems inside and outside the factory*", *California Management Review*, Vol. 43 No. 3, pp. 64-84.

Freeman, R.E., Pierce, J. and Dodd, R. (2000), *Environmentalism and the New Logic of Business*, Oxford University Press, New York, NY.

Friedman, M. (1970), "*The social responsibility of business is to increase profits*", *New York Times*

Magazine, 13 September, pp. 32-3, 122, 126.

Gladwin, T.N., Kennelly, J.J. and Krause, T.S. (1995), "*Shifting paradigms for sustainable development: implications for management theory and research*", *Academy of Management Review*, Vol. 20 No. 4, pp. 874-907.

Hart, S.L. (1995), "*A natural-resource-based view of the firm*", *Academy of Management Review*, Vol. 20 No. 4, pp. 986-1014.

Hass, J.L. (1996), "*Environmental ('green') management typologies: an evaluation, operationalization and empirical development*", *Business Strategy and the Environment*, Vol. 5 No. 2, pp. 59-68.

Hawken, P. (1993), *The Ecology of Commerce: A Declaration of Sustainability*, Collins Business, New York, NY.

Judge, W.Q. and Douglas, T.J. (1998), "*Performance implications of incorporating natural environment issues into the strategic planning process: an empirical assessment*", *Journal of Management Studies*, Vol. 35 No. 2, pp. 241-62.

Kautto, P. (2006), "*New instruments – old practices? The implications of environmental management systems and extended producer responsibility for design for the environment*", *Business Strategy and the Environment*, Vol. 15 No. 6, pp. 377-88.

Nattrass, B. and Altomare, M. (1999), *The Natural Step for Business: Wealth, Ecology and the Evolutionary Corporation*, New Society Publishers, Gabriola Island.

Peng, Y.S. and Lin, S.S. (2008), "*Local responsiveness pressure, subsidiary resources, green management adoption, and subsidiaries' performance: evidence from Taiwanese manufacturers*", *Journal of Business Ethics*, Vol. 79 Nos 1/2, pp. 199-212.

Porter, M.E. and van der Linde, C. (1995), "*Green and competitive: ending the stalemate*", *Harvard Business Review*, Vol. 73 No. 5, pp. 120-34.

Sharma, S. and Vredenburg, H. (1998), "*Proactive corporate environmental strategy and the development of competitively valuable organizational capabilities*", *Strategic Management Journal*, Vol. 19 No. 8, pp. 729-53.

Shrivastava, P. (1995), "*The role of corporations in achieving ecological sustainability*", *Academy of Management Review*, Vol. 20 No. 1, pp. 936-60.

Starik, M. (1995), "*Should trees have managerial standing? Toward a stakeholder status for non-human nature*", *Journal of Business Ethics*, Vol. 14 No. 3, pp. 207-17.

Woestendiek, K. (1998), "*Maverick manager changes minds about the environment*", *Industrial Management*, Vol. 40 No. 2, pp. 12-20.

Siteography

https://www.wolterskluwer.com/it-it/expert-insights/transizione-ecologica-digitale-aziende

https://www.wolterskluwer.com/it-it/expert-insights/transizione-ecologica-digitale-aziende

https://www.bcg.com/publications/2022/how-ai-can-help-climate-change?utm_medium=Email&utm_source=esp&utm_campaign=none&utm_description=featured_insights&utm_topic=climate%20&%20sustainability&utm_geo=global&utm_content=202207_02&utm_usertoken=f6d552239bfebaf2632f97d18fb9730387e58cc5

https://www.workengo.it/transizione-ecologica-le-opportunita-per-le-aziende/

https://tech4future.info/transizione-digitale-transizione-ecologica-vantaggi/

https://www.innovationpost.it/2021/07/16/il-ruolo-delle-tecnologie-digitali-nel-costruire-una-societa-piu-equa-e-sostenibile/

https://www.cell.com/one-earth/fulltext/S2590-3322(19)30225-8#%20

https://elettricomagazine.it/tecnologia-ambiente-sostenibile/green-transition-cambia-imprese-italiane/

https://ec.europa.eu/info/strategy/priorities-2019-2024/europe-fit-digital-age/european-industrial-strategy_en

ISBN: 978-2-931089-30-9

Energy development in the south: an opportunity in times of energy crisis

Maria Antonietta SPOSATO*
Calabria University - Italy

Edith MACRI
Calabria Region - Italy

Antonio D'ORRICO
Calabria Region - Italy

Abstract: Among the great challenges of Western countries, there is the need to identify energy sources that are sustainable, in order to combat, first of all, the effects of environmental pollution.
Usually when we talk about energy production we think of large industrial plants, but in reality it would be enough to focus on other valid alternatives.
Think of agriculture, a candidate to take on an important role in the field of renewable energy, through dedicated crops, livestock and agro-industrial residues, biofuels, biodiesel.
The definition of "Agroenergy" is not readily available, but is the result of interpretations. The term, almost unused by both national and European legislators, is instead used in the technical field to define, in principle, the potential deriving from the agricultural sector.
The regulations, nowadays, are increasingly sensitive to the issue of sustainable energy, for example the Mipaaf Decree on the "agrisolar park".
Specifically, the agricultural sector, still in the take-off phase, could play a key role in the development of a certain resilience of agriculture, not compromising the yield of the land, and at the same time it would be essential to cope with climate change.
The failure of Italian companies to take off in the sector and the lack of competitiveness on the international market is attributable both to the structural limits, such as the particular conformation of the agricultural territory and, of course, to the high production costs.
The south, also in this area, has innumerable potentials, unfortunately underestimated.
The regulatory interventions that are taking place in the sector give hope for the future, as they represent an excellent starting point for the development of new sustainable energies.

Keywords: Energy development, South

Summary:
1-Introduction; 2-Agroenergy; 2.1-Definition; 2.2-Operation **3-Regulatory framework; 4-The Italian situation;** 4.1) The experience of EF SOLARE ITALIA. 4.2) The experience of SOLARFIELD S.r.l. 4.3) Opportunities in the Southern Italy 4.4) Bureaucratic difficulties**; 5-Conclusions.**

1. Introduction

The climate emergency, the energy crisis, the increase in costs, as well as the dramatic scenario linked to the Russian-Ukrainian conflict, give rise to many concerns, and increasingly push towards the development of renewable energies.

* Corresponding Author: maria-a-sposato@libero.it

Much is said about these new “green” energies, but how well do you know their potential?

When it comes to energy production, it is customary to think of large industrial plants, but in reality it would be enough to focus on other valid alternatives, especially renewable sources.

Renewable is any form of energy capable of reproducing itself naturally in a short period of time and which is obtained from the sun directly, through photovoltaic panels, or indirectly (wind energy). J. Houghton states: "in forty minutes the sun sends as much energy to the earth as the whole of humanity consumes in a year"[1]

For years, the most widespread renewable source has been solar energy, of which the earth has ample availability; it is converted into usable energy through the installation of solar or photovoltaic panels. The performance of photovoltaics, compared to traditional fossil fuels, is much lower, and this depends on numerous factors, such as the materials used for the modules, the radiation to which the cells are exposed, etc. However, the difference between energy sources is substantial because, once solar energy is transformed into usable energy, it does not emit greenhouse gases

If it is true that the photovoltaic system is able to generate sustainable energy, it is also true that the constraints it faces are many, think of those of an administrative, condominium, landscape, or simply, think that the installation of the panels requires a considerable amount of land, and often there is the risk of compromising the productivity of the land itself.

An optimal response to the countless problems of today comes from the agricultural sector, a real "reservoir" of energy sources, a potential still unexplored as a source of renewable energy production. From here a new challenge can start, aiming to produce clean and renewable energy, and at the same time guarantee continuity to the ordinary cultivation activities carried out on the ground, without compromising the fertility of the soils, preserving its intrinsic properties.

2. Agroenergy

2.1. Definition

There is no specific notion of agrivoltaic that is readily available, it is in fact the result of interpretations. The term is completely unused by both national and European legislators, while, on the contrary, it is used in the technical field to define the potential deriving from the agricultural sector.

The term “agro-photovoltaic” refers to a sector that is still not very widespread, of a “hybrid” nature, which arises from the merger of two sectors, the agricultural and the photovoltaic one. The goal is to produce renewable energy by means of solar panels installed on agricultural land, without compromising the farming and livestock activities carried out on it.

The concept of agro-photovoltaics was first introduced in the early 1980s by Goetzberger and Zastrow, who argued that solar energy collectors and agriculture were able to coexist on the same ground, generating benefits for both of them.

Later, Dupraz defined agrivoltaic as a "combination of solar panels and food crops on the same unit of land aimed at maximizing land use", while the German institute, Fraunhofer Institute, argued that agrivoltaic guaranteed "the use simultaneous agricultural land and the production of photovoltaic energy”, and furthermore, “the photovoltaic modules also offered shelter to animals”.

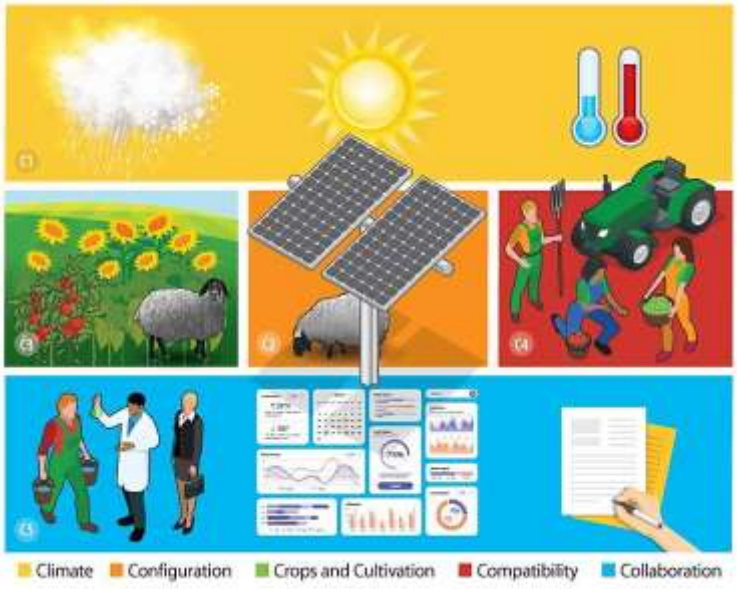
2.2. Operation

The installation of photovoltaic systems on agricultural land cannot be accidental, in fact it requires the existence of certain prerequisites, as well as the knowledge of specific technical skills.

[1] J. Houghton, 1997.

It will in fact be advisable to carry out a precise and exhaustive assessment of the area concerned, considering some factors, such as the type of vegetation cover, water availability, slope, exposure to sunlight, as well as any constraints of various kinds (administrative, condominium, landscape, etc ...) to which the area itself is subjected. Only after the verification of environmental subjection has been made, it will be possible to proceed with the installation.

Some studies have identified elements necessary for the realization of a successful plant, or the "Recipe of the five Cs": climate, structural configuration, selected crops, compatibility and collaboration.

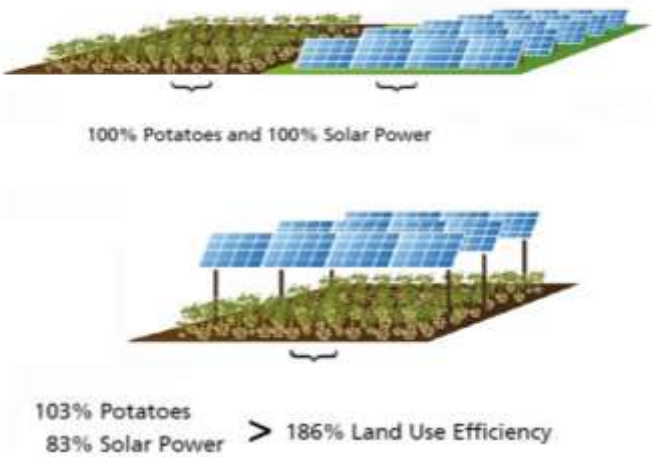


- *Climate*: to make the system efficient it is necessary that the right environmental conditions exist, which are essential both for solar production and for crops grown on the soil.
- *Structural configuration*: it is advisable to carefully choose the technology and design of the system, taking into account the amount of light required, the space required between the panels and the ground, in order to ensure the passage of tools or agricultural machinery.
- *Selected crops*: the most profitable crops and cultivation methods must be identified.
- *Compatibility*: the plant must be built to meet the needs of all partners involved, from sector operators to farmers.
- *Collaboration*: communication and the relationship between the groups is essential for the success of the project.

The installation of an agrivoltaic system involves the installation of photovoltaic panels at an adequate height with respect to the underlying ground, usually about 5 meters, in order to ensure the continuation of the production or livestock activities carried out on it.

The synergy between the photovoltaic (PV) model and agricultural production and / or livestock farming is able to offer multiple advantages, including the optimization of production both from a qualitative and quantitative point of view, and an increase in the competitiveness of farms due to the reduction of energy costs.

Figure 1. *The benefits of agrivoltaics*

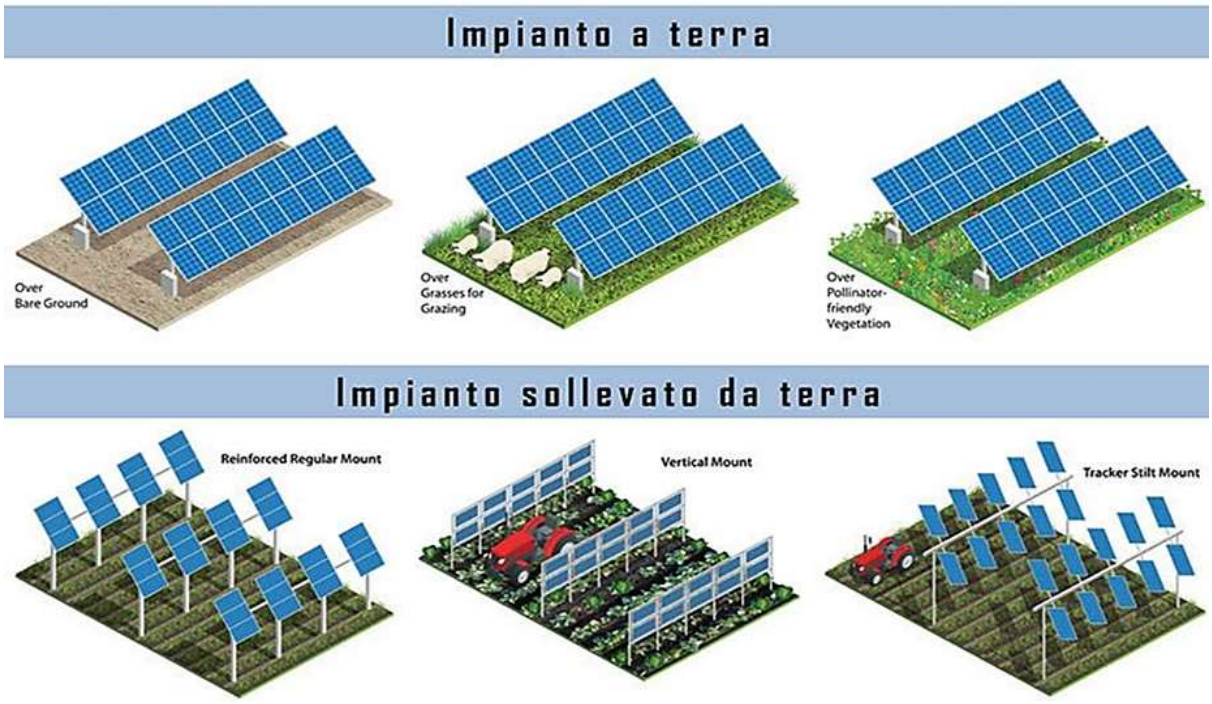


Specifically, the elevated installation of solar panels acts as a protection for crops and / or animals from adverse weather conditions, and also, by favoring shading, they act as protection from excessive sun exposure, resulting in a reduction in water requirements.

Also for this sector there are disadvantages, in fact think of the high costs of design and assembly, or of the management costs certainly higher than the classic photovoltaic panels, as they require periodic checks.

During the installation of the panels, the intervention of personnel with technical and specific skills is required, as it is necessary to identify, on the basis of the analysis carried out previously, the type of structure that best suits the characteristics of the ground, as well as the distance necessary between the modules, the correct percentage of shading according to the crops (Fig.2).

Fig.2. *Types of plants*



The lack of specific studies, as well as the excessive costs, greatly limit the farmer in the choice of crops to be treated on the soil.

Being a developing sector, there is still a lot of uncertainty regarding compatible crops.

Some studies conducted in Germany have made it possible to identify a classification of crops, taking into account their tolerance to coverage by photovoltaic panels (Tab.1).

Tab.1: *Crop classification*

Unsuitable crops	Plants that need a lot of light: wheat, spelled, corn, sunflower, red cabbage, pumpkin.
Unsuitable crops	Cauliflower, beetroot and sugar beet.
Suitable crops	Shading on these crops does not compromise the yield: rye, oats, peas, carrot, leek, celery, fennel, tobacco, radish, green cabbage.
Medium suitable crops	Onions, zucchini, cucumbers and beans.
Very suitable crops	Shading is advantageous for the quantitative yield of potato, spinach, broad bean and citrus crops.

3. Regulatory framework

With regard to the regulatory aspect, the UN, the European Union and the main international agencies have paid particular attention to issues relating to the production of renewable energy, in an attempt to give concrete answers to the countless problems affecting the sector at world. On the international level, the UN intervenes in 2015 with the adoption of the "World Plan for Sustainability", or the 2030 Agenda, including 17 lines of action, including the development of agro-photovoltaic systems for the production of renewable energy.

The 2030 Agenda has also been ratified by the European Union, which has forced member states to adapt. Italy, on 10 November 2017 approves the SEN 2030, or the National Energy Strategy, with validity until 2030 precisely.

On the European side, however, the need to promote the development of renewables is supported to address the problems arising from climate change, by encouraging the installation of photovoltaic systems (Article 194, Treaty on the Functioning of the European Union). The actions implemented must pursue the ambitious objectives of reducing greenhouse gas emissions, energy supply and competitiveness, as well as aiming to ensure efficiency in terms of cost and effectiveness in the use of resources.

At the national level, the legislation is scarce, in fact there is a mere transposition of EU legislation.

In 2020 the MISE (Ministry of Economic Development) adopted the Integrated National Energy and Climate Plan (PNIEC), through which it directs the energy and environmental policy towards sustainable objectives

Unfortunately, compared to the objectives set, Italy is quite slow; just think that about 50 GW of photovoltaic systems should be installed in 2030 overall, and in Italy the annual electricity requirement is 320 TWh, of which only 24 TWh derive from photovoltaic systems.

Only recently has the category of agro-photovoltaic systems been defined in a primary level source, namely Article 31 of the Legislative Decree 77/2021, converted into Law 108/2021, which underlines the peculiarity of the system of combining agricultural production with energy.

Fig. 3. *PNRR Missions*

To date, the “flagship” legislation is the PNRR, implemented with the Simplification Law Decree and converted into Law 108/2021. Specifically, the measure envisaged by the PNRR, included in the mission "Green revolution and ecological transaction", provides support for both the installation of photovoltaic panels on the roofs of buildings, the so-called "Agrisolar park", both for the development of agriculture, or the installation of solar panels on agricultural land, intended to integrate with the underlying crops.

The challenge is to support investments in agricultural, livestock and agro-industrial production structures, increasing productivity, reducing energy supply costs and improving environmental climate performance.

 ISBN: 978-2-931089-30-9

Funding allocated by the PNRR amounts to a total of 1.5 billion euros. To benefit from the incentives will be agricultural and professional entrepreneurs (IAP), both individually and in company form, agro-industrial companies, agricultural cooperatives that carry out the activities referred to in Article 2135 of the Italian Civil Code. and the cooperatives or their consortia referred to in Article 1, paragraph 2, of Legislative Decree no. 228 of 18 May 2001.

The National Energy and Climate Plan also pursues ambitious objectives, hoping to achieve, in concert with the European objectives, an expansion of the system in 2030.

4. The Italian situation

As has already been widely anticipated, in Italy the sector under analysis is still in a phase of timid development, and this is primarily attributable to the lack of a specific discipline at national level capable of guaranteeing a uniform approach, and subsequently to the complex authorization process. and long to follow to obtain the granting of permits for the construction of the plants.

The data published by the Energy Services Manager (GSE) in the "Solar Report 2021" attest that in Italy, out of an estimated total of about 115 TWh of electricity produced in 2021 with renewable sources, only a share equal to 22% is generated by photovoltaics. The latter ranks only in second place among the various renewable energy sources, after hydroelectricity, which covers about 39% of energy production.

Lombardy is the region that has about 160,000 photovoltaic systems, accounting for 12% of the country's total power. In the south, on the other hand, a central role is assumed by Puglia, which stands as the region with the greatest installed power, or almost 13% of the total. In general, it can be said that in 2021 the total installed power is recorded at 45% in the northern regions, 18% in the central ones and 17% in the southern regions.

Fig.4. *Number of photovoltaic plants in the agricultural sector*

Among the main plants / projects registered in Italy:

- Sicily Region: in the province of Ragusa, in Scicli, an agrivoltaic project has been developed, which will cover 22 hectares of land.
- Region of Sardinia: in the municipality of Villacidro an agrivoltaic project of 13,789, called “Primmariu”.
- Puglia Region: has shown wide openness to agrovoltaics.

With the sentence of the Puglia Tar n. 248 of 11 February 2022, the administrative judges authorized the construction of agro-photovoltaic systems in the area.

4.1. The experience of EF SOLARE ITALIA.

"EF Solare Italia" is the first photovoltaic operator to operate in Italy, and boasts a leading position in the growth of the sector due to operational excellence, innovation and the development of new plants. Specifically, the photovoltaic greenhouses introduced in Italy are 9, distributed between Calabria, Umbria and Sardinia, and cultivated by the territorial Greenhouses.

The first EF Solare projects in Calabria developed in the form of photovoltaic greenhouses in the municipalities of Villapiana, Cassano allo Ionio, Scalea and Orsomarso in 2011.

Particularly the agricultural societies that took part are specializing in the cultivation of citrus fruits, such as the cultivation of cedar. With this in mind, the plants have proven to marry the objectives pursued by the agricultural sector, that is to create synergy between agricultural and energy production, and therefore guarantee the ordinary activities carried out on the land, and, at the same time, produce clean energy in full compliance with the healthiness of the environment.

Digital applications have been prepared on the greenhouses concerned that allow monitoring the physiological activities of the plants.

The results recorded so far have been excellent, such as the reduction of the annual water requirement and the overcoming of the quality standards required on the market.

These cases could serve as an example to highlight the countless advantages that can be gained from this system.

4.2. The experience of SOLARFIELD S.r.l.

"Solar Italy VI" is a plant located in Mazzocchio, Pontinia (LT), or better known as "Pontinia agrosolar field". The Pontinian plain has structural and climatic characteristics such as to make it one of the best areas with an agricultural vocation. It represents the typical example of a school to be used to indicate how efficient the agrivoltaic system can be, as the cultivation activities carried out there have not been compromised by the installation of the panels, indeed, in terms of profitability, positive developments have been recorded.

The installation of the plant has thus made it possible to increase employment, thanks to the introduction of professional figures, qualified personnel and to convert and conform to the new specific agricultural and agricultural techniques, with a marked increase in competitiveness on the markets.

4.3. Opportunities in Southern Italy

Technological and regulatory developments regarding the sector of energy production from renewable sources have opened up new scenarios and new opportunities for the South. The new technologies make it possible to create production plants even of small dimensions, allowing them to be adapted to the structural needs of territories and companies in geographical areas that were previously considered unsuitable.

The study "Towards Italian energy autonomy", conducted in recent weeks by The European House Ambrosetti with the A2A, saw Sicily take the podium, alongside Puglia and Lombardy. The southern Sicilian territory has shown to have a strong potential, such as to be able to develop real photovoltaic power plants in an intensive way.

What condemns the South of the country are the economic, social and geographical aspects, which affect the installation of the modules.

The South has a potential that still remains untapped and that, if properly exploited, could place it among the best partners in the energy transaction.

Unfortunately, however, the huge assets of green energy remain immobilized by bureaucracy and incomprehensible denials, as well as by the lack of an ad hoc discipline.

The hope is that renewables can be spread with limited impacts on the territory, generating clean energy, but at the same time building a new productive fabric.

4.4. Bureaucratic difficulties

In order to move forward, the ecological transaction requires the overcoming of the stringent and suffocating rules, of the extremely complex authorization procedures. The public interest in installing "green" systems must be able to prevail over all other public interests, including landscape ones. The lack of ad hoc legislation generates more problems and confusion.
Fortunately, even the TAR and the Council of State, through their rulings, seem to be moving in the right direction. The farmer therefore receives greater protection from unjustified authorization denials.

A recent case is that concerning the municipal administration of Tufara (Campobasso), whose appeal, concerning a project for the construction of a wind farm presented by a company, is accepted by the TAR, which maintains: "the public interest in protecting of the cultural heritage does not have, in the concrete case, the weight and the urgency to completely sacrifice the non-postponable environmental interest of the ecological transaction ".

Even the TAR Lecce, through four rulings, underlines how fundamental the conversion to agrivoltaic is, stating that photovoltaic systems on agricultural land are "deserving of a special treatment compared to classic ground systems, also in light of the programmatic lines dictated by the PNRR and the incentive measures introduced by the state legislator ".

More specifically, the administrative judges send a warning to the administrations, including local ones, to encourage the spread of agro-photovoltaic systems, to deal with emerging problems, which could prove deleterious over time, with an invitation to balance between the interest in the conservation of agricultural capacity and the production of sustainable energy.

Too often the refusal for the installation of "green" plants comes from Regions and local authorities, which is why, already with the Draghi Government, a positive opinion of compatibility was given for real renewable projects blocked in the dispute between the Ministry of Ecological transaction and that of Culture.

5. Conclusions

Nowadays, the search for alternative energy production sources is due to a series of aforementioned contributing causes, namely climate change, the inevitable exhaustion of fossil sources. Promoting the multifunctionality of agriculture to ensure survival is therefore the primary objective, being the most promising energy source among those defined as renewable.

As has been specified several times previously, Italy is lagging behind both in reducing CO2 emissions and in producing energy from renewable sources. Therefore it will be necessary to increase the production of agro-energy, improving the system for placing them on the market, and if necessary, promoting tax relief measures in favor of the consumption of biofuels.

Agro-energies are therefore an open discourse. The interests at stake are many.

The goals set by the Agenda2030 are also very ambitious, so we hope to be able to achieve them as soon as possible, also considering the slowdown recorded with the pandemic and due to the recent conflict.

Every day, in the endless list of things to do, concrete action should find space to make the world "greener", move together towards a resilient and sustainable future, proposing initiatives to raise awareness among citizens, businesses and institutions towards economic development and social that is able to enhance the territorial agricultural vocations, protect biodiversity and local agri-food traditions, as well as contribute to the energy transaction in full respect of the landscape and the environment.

"The seeds of opportunity sprout under the solar panels."

Bibliography:

- Agostini, A., Colauzzi, M., Amaducci, S. 2020. Innovative agrivoltaic systems to produce sustainable energy: An economic and environmental assessment. Applied Energy 281 (2021)
- Avv. Emilio Sani - Le novità normative per le rinnovabili– Sani Zangrando Avvocati- 15 Luglio 2022
- AWARE, Il sistema agrivoltaico: rischi, benefici e opportunità per la transazione energetica, Novembre 2021.
- Beneath Solar Panels, the Seeds of Opportunity Sprout: Low-Impact Development of Solar Installations Could be Win-win-win for Food, Water, and Renewable Energy, 1 Aprile 2019.
- Di Chiara Natalicchio, Agricoltura e Fotovoltaico si fondono: nasce l'agrivoltaico, 14 novembre 2021.
- G. Bollini, L'agricoltura e le fonti energetiche rinnovabili.
- GSE, Energia da Fonti rinnovabili, Rapporto statistico 2019.
- GSE, Rapporto statistico - Il solare fotovoltaico in Italia. Stato di sviluppo e trend del settore, Maggio 2022
- ISPRA, Multifunzionalità dell'azienda agricola e sostenibilità ambientale, 128/2010.
- Legambiente, Agrivoltaico, le sfide per un'Italia Agricola e solare, Ottobre 2020.

Sitography:

- www.fiscoetasse.com
- www.gse.it
- www.industrial-innovation.it
- www.legambiente.it
- www.lexambiente.it
- www.nrel.gov

Regulations:

- 27 aprile 2022, n. 34,
- Consiglio di Stato Sez. VI n. 8167 del 23 settembre 2022
- Decreto-legge 1° marzo 2022, n. 17

ISBN: 978-2-931089-30-9

Special Panel FeNCo

(Federation of Foreign Diplomats and Consuls in Italy)

The role of diplomats in supporting people on a journey, promoting environmental protection and the development of territories and food cultures

ISBN: 978-2-931089-30-9

Special Panel FENCO - Federation of Foreign Diplomats and Consuls in Italy:

The role of diplomats in supporting people on a journey, promoting environmental protection and the development of territories and food cultures

Presentation of Fe.N.Co. and its initiatives at Italian and international level

Gianvico CAMISASCA*
Vice President FeNCo, National Federation of Foreign Consuls in Italy

Fe.N.Co – National Federation of Foreign Diplomats and Consuls in Italy - is an association that groups Career Diplomats and Honorary Consuls from foreign countries represented in Italy.

FeNCo has just turned ten, and is already deeply recognized by Italian and international institutional realities.

Abroad it is a member of FICAC (World Federation of Consuls, based at the UN) and of FUECH (European Federation of Consuls Associations).

The headquarters of FeNCo are in Rome, with operational offices in Milan and Naples and various regional capitals, and maintains constant contact with the main local Authorities

The Diplomatic Corps in Italy, is currently composed of about 960 accredited representatives with active Exequatur.

The Federation maintains periodic contacts with the whole Consular Corps illustrating the activities carried out, with special newsletters and provides help and services to all consular office in Italy.

The Federation, as per statute, intends to:

1. keep up - together with the prestige of the Federation's role - the importance of the service performed by the consuls by affirming their social, cultural and economic values;
2. participate in the study and resolution of problems concerning international diplomatic, economic and social development, spreading the human and moral values of the diplomatic world especially among young people;
3. contribute to the cultural formation of young people, to their education in the ethics of service and to the values promoted by the Federation, to their introduction to the diplomatic world;
4. protect the dignity and prestige of the consular missions in the ways permitted by current international regulations.

* For information and contacts: segreteria.fenco@gmail.com

ISBN: 978-2-931089-30-9

Special Panel FENCO - Federation of Foreign Diplomats and Consuls in Italy:

The role of diplomats in supporting people on a journey, promoting environmental protection and the development of territories and food cultures

The case of the Institute of Southern Culture of Naples

Gennaro FAMIGLIETTI*
FeNCo National Coordinator, and Honorary Consul General of Bulgaria for Southern Italy

The Institute of Southern Culture was founded in 1995 as a laboratory of ideas, aimed at promoting culture and the South of Italy, with significant attention to the themes of Catholicism, dedicated in particular to the younger generations, to offer some useful tools to grow , as men and as citizens. It is housed in the splendid, frescoed halls of the noble floor of Arlotta in via Chiatamone in Naples.

Mr. Gennaro Famiglietti is its founder, president and exclusive financier. In these twenty years of activity, the Institute has become an authoritative open place for privileged meeting and comparison, which has hosted events of all kinds, from economics to art, from publishing to cinema, music and fashion, in sign and in the affirmation of legality and common well-being.

He recognized role of the Institute is testified by many important personalities of the institutional, diplomatic and cultural life who have participated in the initiatives promoted, starting with the presidents of the Republic Francesco Cossiga, Oscar Luigi Scalfaro and Carlo Azeglio Ciampi. Palazzo Arlotta thus hosted messengers of faith such as Cardinal Crescenzio Sepe and Monsignors Lorenzo Leuzzi, auxiliary bishop of Rome and chaplain of the Chamber of Deputies, and Luigi Francesco Casolini, rector of the Knights of San Silvestro; and, again, jurists such as Francesco Paolo Casavola, philosophers, scientists, journalists, historians and art critics. Recent initiatives include the awarding of the prize International People for culture and peace in Lech Wałęsa and the setting up of the collective contemporary art exhibition Famiglietti, with which about thirty artists have translated into a work - painting, sculpture, photo or installation - their own vision of the patron saint of Naples, a visceral and essential icon of the essence of the city.

Owner of one of the major Italian law firms, with offices in Italy and abroad, the lawyer Gennaro Famiglietti combines the profession practiced by the family for several generations with intense activity in the diplomatic and social fields - he is honorary consul of Bulgaria, coordinator of the National Federation of Consuls FENCO and Commander of the Order of Merit of the Republic - as well as a strong commitment to promoting the culture and values of Catholicism.

Starting from the thought of Elio Vittorini, according to which "culture is not a profession for a few: it is a condition for everyone that completes the existence of man", the president Famiglietti guides the Institute always in search of new ideas, current themes and engaging that give rise to constructive comparisons.

* For information and contacts: segreteria.fenco@gmail.com

ISBN: 978-2-931089-30-9

Special Panel FENCO - Federation of Foreign Diplomats and Consuls in Italy:

The role of diplomats in supporting people on a journey, promoting environmental protection and the development of territories and food cultures

Considerations about Memorandum of Understanding between International Trade Centre and *Federazione dei diplomatici e consoli esteri in Italia* (Fe.N.Co.)

Giorgio Franco ALETTI*
FENCO Treasurer Counselor, and Honorary Consul of the Czech Republic

WHEREAS the International Trade Centre (hereinafter referred to as "ITC"), with Headquarters in Geneva, Switzerland, the development partner for trade success, is the joint technical cooperation agency of the World Trade Organization and the United Nations;

WHEREAS ITC, in its aim to contribute to the achievement of the goals of the United Nations 2030 Agenda for Sustainable Development, generates sustainable incomes and livelihoods especially for poor households, by connecting enterprises to regional and global markets and enables small business trade success in developing and transition countries by providing, with partners, inclusive and sustainable trade development solutions to the private sector, trade and investment support institutions (TISIs) and policymakers;

WHEREAS ITC aspires to hold up the values of vision, integrity, excellence, pragmatism and responsiveness;

WHEREAS ITC is leveraging its strategic objectives which are: building awareness and improving the availability and use of trade intelligence; strengthening TISIs; enhancing policies for the benefit of exporting enterprises; building the export capacity of enterprises to respond to market opportunities; mainstreaming inclusiveness and sustainability into trade promotion and export development policies;

WHEREAS ITC bases its integrated solutions around the following focus areas where the organization has a comparative advantage in: (1) providing trade and market intelligence; (2) building a conducive business environment; (3) strengthening TISIs; (4) connecting to international value chains; (5) promoting and mainstreaming inclusive and green trade; and (6) supporting regional economic integration and South-South links;

WHEREAS Federazione dei diplomatici e consoli esteri in Italia (hereinafter referred to as "FENCO", with headquarters at Rome or Milano is to contribute to the study of development problems, implementation of development and training initiatives in the area of international relations, commerce and trade ecosystems;

NOW, THEREFORE, ITC and FENCO (hereinafter collectively referred to as the "Parties", and each individually as a "Party") have agreed to the following:

Article 1. Purpose

The purpose of this Memorandum of Understanding (hereinafter referred to as "MOU") is to establish a framework of cooperation between ITC and FENCO in the area of business

* For information and contacts: segreteria.fenco@gmail.com

ecosystems and in particular in alternative dispute resolution, international contracting and regulatory frameworks for small and medium enterprises.

Article 2. Areas of Cooperation

Subject to the availability of funds, the Parties' respective strategic frameworks and priorities, and without prejudice to the necessary approvals required pursuant to the Parties' internal regulations and rules in effect at the time of the planned implementation, the Parties' cooperation will be related to set-up and present to potential donors the ITC International ADR Initiative -mediation & arbitration-.

The activities shall include but not be limited to meeting with stakeholders and donor community, including but not limited to Chambers of Commerce and ADR, professional associations and federations at national and international levels.

ITC will provide technical inputs in the area of alternative dispute resolution, international commercial contracting and other business ecosystem related areas of expertise and participate as required in technical and institutional events.

FENCO will contribute to resource mobilization for the project, promote the initiative within its international network, facilitate meetings with key private sector donors and organize events in the project related areas.

ISBN: 978-2-931089-30-9

Special Panel FENCO - Federation of Foreign Diplomats and Consuls in Italy:

The role of diplomats in supporting people on a journey, promoting environmental protection and the development of territories and food cultures

The Mediterranean is a crossroads of civilization, religions and cultures

Emanuele BETTINI*
FENCO Delegate of Lombardia District, and Secretary General PEN Italy

The Mediterranean is like a continent where peoples are united in the affirmation of their diversity.

In this sea important cultures and civilizations have met such as the Egyptian, Greek, Roman and Arab ones. The Phoenicians also played a key role in trade routes. Peoples fought in the name of political and religious power, but history united them in a common destiny. From this common destiny the first communication tool was born: the Egyptian hieroglyphs. Then the various languages spoken by the peoples that overlook this sea were born. At the center of this human adventure is the island of Malta which is the beating heart, the key to understanding the entire Mediterranean civilization.

History has traced the paths of entire generations from north to south, from east to west, from south to north and even from west to east in the search for a better life. In the past there have been migrations for political and religious reasons. We remember the journey of Paul of Tarsus who was shipwrecked near Malta on his way to Rome. Let's not forget Ulysses and let's not forget Aeneas who played important roles in classical times. Today we talk about Ukraine, remember that the south-western part of the country was a Greek colony and that the Bosphorus is also called "the second pillars of Hercules".

As Secretary General of Italian Pen Club and as Fe.N.Co. for the provinces of Lombardy and the metropolitan area of Milan, as well as a writer, I had the opportunity to establish working and collaborative relationships with many Mediterranean countries and in particular with those participating in this conference. In the universal declaration of linguistic rights, signed in Barcelona in 1996, it is stated that there is no freedom and understanding without mutual knowledge and dialogue in respect of one's own identity.

Let's go back to talking about Malta as a crossroads of cultures and trade routes. The Maltese language is a language belonging to the Semitic group including references to the languages spoken in the Maghreb, the Arabic language and the Sicilian language. In fact, the current Maltese language originates from the Arabic dialect of Sicily, which in turn was linked to the languages spoken in the Maghreb and in particular in present-day Tunisia with Tunisian Arabic. This linguistic path demonstrates the centrality of Malta in the Mediterranean chessboard.

The presence of Maltese writers on the international level is very important through the foundation of the PEN Center in Malta chaired by the writer IMMANUEL MIFSUD which took place during the online congress of 13 March 2021.

We propose the official communication letter to Maltese citizenship:

* For information and contacts: segreteria.fenco@gmail.com

"Dear members of PEN Malta,

With great pleasure I announce that, after months of intense work, earlier this afternoon, during its annual world congress, PEN International approved our application to found the Maltese PEN Centre and thus we are formally acknowledged as a Centre. I take this opportunity to thank all those colleagues who had the initial vision to establish PEN Malta, and you, founding members, who gave us your support for this endeavour.

May I also ask you to keep yourself up to date by regularly checking our website, Facebook, and Twitter, as on the 12th of October we shall be organising an important event marking the fourth anniversary of Daphne Caruana Galizia's murder.

Immanuel Mifsud (President PEN MALTA)"

Daphe was killed in 2017 when a car bomb exploded in her Peugeot 108 parked at her residence in Bidnija, near Mosta.

The poetess Catharine Amy Dawson-Scott founded the International Pen in 1921 when she was still very much in the horror of the First World War. The urge to be reborn as members of a peaceful and cooperative community explains the success of the slogan launched at the time by Dawson-Scott: "Break the isolation of British intellectuals".

The origins of the Pen are marked by his name and that of John Galsworthy, winner of the Nobel in 1932. First president of the English Pen, Galsworthy infused the association with that libertarian imprint that, in 1933, brought Wells, the new president of the International. Pen, to expel, in the Dubrovnik congress, the German Club for not having taken the defence of Toller, Heidrich and Mann, writers exiled by Nazism.

The Italian Pen club, which I am honoured to represent, has published an anthology, edited by the writer Lucio Lami, entitled "RACCONTI SENZA DOGANA". The book contains texts by the Maltese writer IMMANUEL MIFSUD and by the poet and writer STEFANOS STAVRIDES of Cyprus.

The magazine SI SCRIVE, directed by me, has published several Albanian poets translated into Italian. We can remember the diplomat VISAR ZHITI, BESNIK MUSTAFAJ former Minister of Foreign Affairs and GËZIM HAJDARI.

It should be remembered that the magazine SI SCRIVE has proposed to the Italian reader an important review dedicated to the poets of Bessarabia. We recall some names: EUGEN CIOCLEA, VALERIA GROSU, ARCADIE SUCEVEANU, VSEVOLOD CIORNEI, LEO BORDEIANU, TEO CHIRIAC and others.

I conclude by referring to a special issue of the magazine dedicated to Algeria entitled ALGERIA - A FRANCOPHONE LITERARY PATH IN THE MEDITERRANEAN. The book officially brings greetings from the Ambassador of the Algerian Republic in Rome.

We must also remember the presence of the Ukrainian poetess LINA KOSTENKO with the work ODISSEA SCITICA which offers the reader a Mediterranean journey through Greek culture.

The Mediterranean is the place of meeting and comparison of cultures and has a fundamental role in the chessboard of world balance. Without the Mediterranean, the history of our peoples would never have existed.

A person of considerable importance in Maltese literature was the writer and literary critic Oliver Friggieri, professor at the University of Malta. Professor Friggieri collaborated with the international literature magazine SI SCRIVE published by the Province of Cremona. He has translated several Italian authors into Maltese.

Finally, I propose a text of mine translated by Friggieri himself. The text proposes a symbolic journey in the troubled Mediterranean sea:

In viaggio

È come se io non fossi mai esistito
eppure soffro nell'attesa raccolto
come un bambino che balbetta
aspetto incerto dunque
qui dove ogni corpo si ritrova
nella trasgressione navigando
da un mondo all'altro
sonnambulo con gli occhi aperti
destinati anzi al risveglio
che ancora non conosco.

Fi triqti

Qisni jien qatt ma kont
u xorta nbati miġbur nistenna
bħal tfajjel li jlaqlaq
nistenna bejn ħaltejn mela
hawn fejn kull ħaġa ssib ruħha
fil-qilla waqt li nbaħħa
minn dinja oħra
bin-ngħas b'għajnejja miftuħa
li xorta se jkollhom jistenbħu
f'żerniq li għadni ma nafux.

ISBN: 978-2-931089-30-9

Last run from the Past

Papers from some previous UNICART Conferences, received too late to appear in their own Proceedings Books

ISBN: 978-2-931089-30-9 PROCEEDINGS BOOK

Informal Economy in the time of COVID-19! (Case Study: Albania)

Armelina Lila (Fushekati)*
Mediterrean University, Albania

Abstract: The COVID-19 pandemic era, a previously unexplored route, where the citizen with or without intent tends to deviate from the path of law by trying to find the fastest way to survive, although this path greatly affects the country's economy. The most commonly used form is Informal Economy and Tax Evasion.
The Informal Economy is not only an Albanian phenomenon but a global and even widespread event. Its consequences are intended to reduce or eliminate the financial contribution to state coffers and impede the proper functioning of the market economy. To cure this "disease" it is first important to deal with the causes that lead to tax evasion and then with its consequences and solution. This phenomenon could easily jeopardize one of the key policy objectives of the National Strategy for Economic and Social Development.
The level of corruption and the informal economy in a country is very difficult to be evaluated objectively. However, various data lead to the widely accepted conclusion that Albania still suffers from high levels of the informal economy in many areas, so fighting corruption and achieving concrete results in this area is one of the priorities that the Albanian Government must fulfil on the path of the country's accession to the European Union.
This paper analyses the Informal Economy levels in Albania as well as tax evasion and explains the reasons why these levels are as such. Analysing the recommendation of International Institutions will lead us to some conclusions related to the reduction of tax evasion which is considered possible if the government audit activity increases to improve tax collection.

Keywords: Informal Economy; Financial Transparency; Tax Evasion;

I. Introduction

The Albanian economy went through Transition on its way from the Communist Regime's centralized economy to the market economy. Albania has been plagued with accompanying and troubling issues such as corruption and informality since the beginning of this long economic and political transition. These phenomena are precisely what generate roadblocks to and slowdowns in economic development.

Due to its numerous dimensions, it is difficult to identify a single contemporary term because the concept of corruption differs by environment. Corruption is usually described in a public context as a criminal act involving the misuse of power and public trust for personal benefit. Corruption is a global issue that threatens sustainable development while also increasing poverty and inequality. It can be found in every part of the world, at any time, and in various shapes and sizes. In the absence of public ethics and accountability, corruption thrives, eroding the basis of a peaceful, wealthy, and just society.

"The misuse of entrusted power for private gain" is how corruption is defined. Corruption can be defined in a narrower sense as any breach of duty by officials or responsible persons of legal entities, as well as any activity by the perpetrators or beneficiaries of this behavior, in exchange for a service that is directly or indirectly promised, provided, given, requested, accepted, or expected to be taken for oneself or for another person. Both active and passive corruption are included in this definition. In this context, addressing the Global Entrepreneurship Summit in November 2014, Mr. Biden, then-Vice President of the United States, said: "Fighting corruption is not only good governance. It's a matter of self-defense. It's a patriotic

* Corresponding Author: armelina.lila@umsh.edu.al

gesture". Unless governments find effective strategies to address this phenomenon, it will continue to exist (Mauro, P., & Driscoll, D. D., 1997). Numerous studies have been performed to investigate the issue of corruption, its levels, its impact on the economy and society, and measures to reduce it. The contemporary literature on corruption emphasizes the negative impact it has on economic progress. (Klitgaard, R. (1998); Shleifer, A., & Vishny, R. W. (1993); Mauro, P. (1995); Cheung, S. N. (1996); Bardhan, P. (1997).

The informal sector, on the other hand, has been a major issue since the beginning of the transition period. Tax evasion and illicit work are both linked to the informal sector. The contemporary literature on corruption emphasizes the negative impact it has on economic progress. They encompass all economic activity that evade legal responsibilities to pay taxes by failing to comply with social security obligations and so infringing on the rights of disadvantaged populations.

"A set of activities that are in principle legal and should be subject to taxation but are not disclosed as legal commercial activities and, as a result, are not included in the value of national income or are partially included in GDP," according to the informal economy definition by Thomas (2001).

The shadow economy, also known as the parallel economy, the underground economy, or the informal economy, is that part of the economy that does not adhere to the current legal framework and would be subject to taxation if reported to the fiscal authorities. The informal economy accounts for 10 to 50 percent of GDP, depending on the country, with the informal economy accounting for less in rich countries and more in transition or emerging countries.

The amount of currency in circulation, the decline in employee engagement in the official economy, the decline in the official rate of economic development, and the rise in corruption impacting officials directly associated to tax and customs administration are all signs of the informal economy.

We will examine the notion of corruption, the informal economy, and tax evasion, as well as present levels and some recommendations for reducing evasion, using existing literature. In both industrialized and developing countries, corruption and the informal economy repel investors, diminish public expenditure productivity, reduce tax revenues, skew resource allocation, and hinder economic progress. Studies by the World Bank, the International Monetary Fund, the OECD, and others have emphasized the consequences of these phenomena. Although total eradication of corruption and informality is unachievable, limiting and taking immediate action is critical in order to minimize, efficiently manage, and combat corruption.

2. Corruption

2.1. Corruption as a concept

Corruption has received a lot of attention in the twentieth century as a complicated phenomena that impacts not only the economic performance of industrialized countries but also that of emerging countries. Corruption, according to the OSCE, is a substantial threat to any country's security and stability. By impeding social and economic development, deterring investment, and distorting markets, it undermines democracy, undermines the rule of law, and diminishes citizens' trust in government institutions. In a 2001 report, the World Bank identified this problem as a major impediment, calling it "the largest impediment to economic and social growth." Transparency International saying, "Corruption is one of the most contemporary concerns in the globe." Of course, this results in inefficient resource allocation and upsets both the private and public sectors. Many studies have shown that corruption has a negative impact on the economy (Klittgard, 1988; Shleifer & Vishny 1993; Mauro 1995; Bardhan 1997). The International Monetary Fund (IMF) supports the theory that "many of the causes of corruption are economic in nature, and so are its consequences; weak government has a clear deterrent effect on economic activity and well-being."[1] These organizations fight corruption by holding conferences, parliamentary seminars, and numerous reports in over 180 countries throughout the world.

"Corruption is a conduct that deviates from the formal duties of a public role in exchange for private benefits (personal, family, relatives, etc.) in money or status earned," according to the most common definition. There are many different definitions of corruption, and there are sometimes disagreements among experts on the subject, but one thing that everyone agrees on is that it has bad economic and societal implications. It's a "breach of moral principles, qualities, and integrity." (Webster, 2007). Huntington's conversations have been the most popular. Huntington (1968) and Myrdal (1971). According to Huntington, corruption is a modernizing phenomenon that has little impact on economic

[1] The IMF www.imf.org/facts/gov.htm

development, however Myrdal claims that corruption creates significant barriers to a country's development. GRECO[2] has developed many perspectives on corruption, defining it as accepting bribes directly or indirectly from a person entrusted with a public or private duty for personal gain or for the benefit of others. The OECD, on the other hand, defines corruption as any beneficiary accepting bribes or making promises for the aim of unlawful gain. So, when a public official who is motivated by private benefits treats persons preferentially, despite the fact that it is not legal.

Lucy Koechlin, a lecturer at the University of Basel in Switzerland, characterized corruption in her TEDx Talk "Power of Corruption" in January 2016 as

1- "*a mode of existence"*

Regardless of an individual's political, economic, social, or religious stature, corruption exists everywhere. Personal relationships are intertwined with professional ones, where knowing someone in a high-ranking position bears more weight than following the regulations. This is why many people tend to corrupt or are corrupted in order to profit from their relationships.

2-- *"a competitive advantage"*

Corruption is like a game; you will win something, such as a job, a license, or a project, and you can use such "tricks" of deceit as the gift of a bottle of nice summer wine in addition to the good presentation you can make to the customer. The same systematic approach applies to businesses that can provide them with a competitive advantage.

3- *"If you are poor, you are stupid. If you are not corrupt, you are stupid"*

What is true on a corporate level is also true on a social level. Corruption is a big phenomenon that has an enormous impact on many facets of society. Under the effect of corruption, inequity in society becomes more pronounced. Many people lack the necessary contacts, communication skills, and financial resources to accomplish what they desire.

4- "We can endure corruption, but we can also perish from it."

Corruption's impact on social inequality leads to plenty of societal interferences. Corruption kills a lot of people. People in poor health die in hospitals because they can't afford to pay doctors and nurses, and they sometimes don't even get to the hospital because they can't afford to bribe the person who registers them. As a result, all those who are not corrupt in some form find it difficult to cope with life's challenges.

Many efforts, procedures, policies, and strategies have been implemented in order to promote awareness, identify and reduce corruption, and sanction violators of set norms, as well as to build a more transparent society with integrity and transparency at every level.

2.2. The economic consequences of corruption

Corruption has a negative impact on all cultures, with negative consequences extending to all aspects of life, including social, economic, and political life. Following the findings of numerous prior researches, it is clear that corruption has a negative economic and social impact on the potential to achieve long-term progress. Corruption, understandably, overshadows competition for high-quality goods and services, impeding the development of a normal market.

Bribery, extortion, offering illicit favors, and engaging in criminal acts are all examples of corruption. Given that corruption stifles economic progress, exacerbates inequality, and distorts the distribution of public funds and/or expenditures, it is necessary to realize that it has an indirect impact on the poor.

Countries that have recently completed the transition phase, such as Albania, are nevertheless suffering from the economic effects of corruption:

- Investments. Countries that have recently completed the transition phase, such as Albania, are nevertheless suffering from the economic effects of corruption. According to Mauro (1995), countries with the highest levels of corruption have the lowest levels of investment. If new investors are compelled to pay bribes in order to secure the necessary permissions, their interest and motivation to invest will be diminished. Because corruption in Albania is not centralized and well-organized, paying a bribe to a public official does not guarantee that work will be completed, as procedures may be obstructed by other factors.
- Inflation and exchange rate. Inflation rates are typically higher in the most corrupt countries. These countries also have a tendency to depreciate their currency, which may benefit exports from targeted countries and sectors but hinder imports, which are the lifeblood of developed countries.

[2] GRECO- EU anti-corruption committee formed on 1 May 1999

- Lowering the standard of living for the majority of the population, as shifting the source of funds creates a divide between those who benefit from corruption (who are fewer in number) and the rest of the population (taxpayers), whose incomes fall as corruption levels rise, lowering their standard of living. According to a World Bank report from 2020, Albania has the highest poverty rate in the Western Balkans (32.6%), with nearly a third of the population living on less than $ 5.5 per day.
- An increase in criminal activity: Corruption is a criminal act in and of itself, but it also contributes to the rise in other criminal offenses such as theft, murder, and so on. Theft, in all its forms, accounts for the majority of criminal charges in Albania, enriching itself with other corruptive activities. Theft is closely linked to financial gain. As the amount of corruption rises, so does the level of income for the majority of the population, increasing the options for committing theft as a means of earning a livelihood.
- Public revenues and expenditures. According to recent study, corruption lowers the quality of public infrastructure. Corruption is frequently associated with the informal economy.
- Lowering market competition, lowering demand, and delivering high-quality goods and services
- Causes revenue distribution inefficiencies, allowing less efficient and more generous bribe-taking contractors to benefit from government contracts. When the cost of bribery is factored into the price of commodities, demand for those goods falls, the production system becomes one-sided, and consumption falls below efficiency levels. Corruption diminishes social welfare in certain circumstances.
- Citizens' trust in government is diminishing. We can mention corruption in the court system, which has a substantial impact on individuals' trust in the bodies that make up this system because it is directly tied to individual fundamental rights and freedoms, as well as the concept of "rule of law."

Corruption as a phenomenon has many negative impacts on society, but the production of illegality, inequality, and violations of individuals' fundamental rights and freedoms is one of the most important and related to corruption as a concept. There is a lot of discourse about corruption, but there isn't much discussion about its concrete dimensions and facts. Analysts and various organisations that have examined this problem have made proposals for reducing corruption, some of which we shall discuss further below.

2.3. Corruption in Albania

Corruption jeopardizes a country's economic progress by undermining the rule of law. This behavior can be found in both industrialized and underdeveloped countries. Politicians' companies or high-level institutions are the main sources of corruption. The US Department of State (DASH) report on the business climate 2021, is expressed with high critical marks for the business climate in Albania. According to Transparency International's Corruption Perception Index 2021 (CPI) [3], Albania has a relatively low ranking in the corruption category, placing 110th out of 180 nations (deteriorating compared to 2019 when it was in 106th place and 2020 where it was instead of 104). Albania is widely regarded as the most corrupt country in Europe and the region. The Perceived Corruption Index (CPI) assigns a score to countries and territories based on how corrupt their public sector is viewed. The position of a country or territory in the index is indicated at the country or territory level.

Meanwhile, the level of corruption in Albania was highlighted in a report issued by Trading Economics,[4] which stated that in previous periods in 2012, our country was rated in the top spot for corruption, namely 113th, and its lowest level was in the country 81st in 2002. Graph 1 shows Albania's positions on corruption from 2012 to 2021.

Historical data shows substantial changes in Albania's corruption ranking over the years, with the lowest level reported four years ago. Although our country has made little headway in reducing this phenomenon in 2021, we are still at dangerous levels compared to 2019.

The findings of the CPI 2021 were released by Transparency International, and Albania was ranked 110th out of 180 nations, down four places from 2019. Albania received a total of 35 points out of a possible 100. The fight against corruption in the public sector remains one of the world's most pressing issues, with most countries rated as "making little or no progress" in this area. The most affected areas in Southeast Europe include law enforcement, justice reform, free media, and civil society.

The claim that corruption is a "global concern" is especially true in the Western Balkans and Southeast Europe (SEE) region, where a number of interrelated issues, such as armed conflict, cross-border

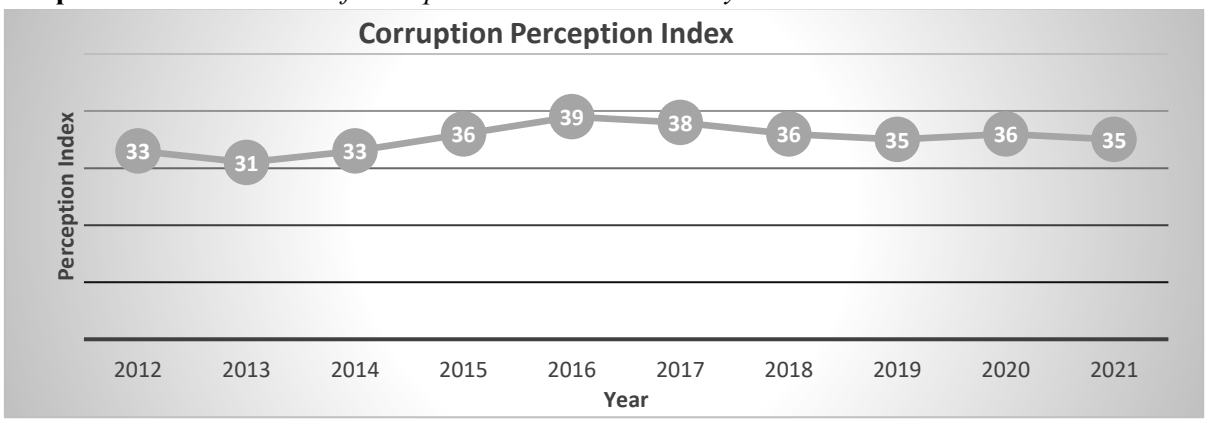
[3] Transaparancy International, ëëë.transparency.org/country/ALB
[4] Trading Economics, tradingeconomics.com/albania/corruption-rank

crime, communist legacy, and low levels of development, have recently been intertwined with the economic crisis before and during covid-19, geopolitical, and migration, have turned bribery and abuse of public positions into a systematic problem, which citizens are increasingly referring to as "state capture."

Graph 1. *Albania's ranking in terms of corruption levels throughout time. (Year 2012-2021)*

Source: *Trading Economics, Transparency International*

Graph 2. *Score evaluation of corruption in Albania over the years 2012-2021*



Source: *Trading Economics, Transparency International*

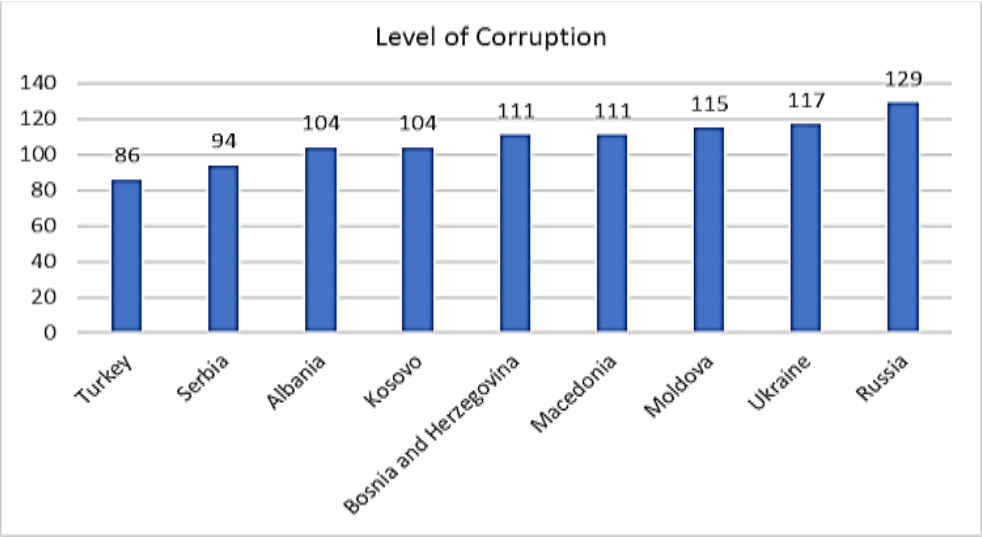
According to Albania 2020 Report of the European Commission COVID-19 pandemic is a global shock that has not spared the Western Balkans. It represents an unprecedented burden on their health and social protection systems. The final extent of its footprint in terms of loss of human lives and damage to the economies is still difficult to assess, but early Commission estimates foresee a drop of between 4 and 6% of Gross Domestic Product (GDP) in the region. Thousands of citizens are at risk of losing their jobs, and temporary government support measures (unemployment benefits, deferrals/waivers to tax and social security contributions, etc.) have an important fiscal impact.[5]

Albania, as a developing country, is given a ranking on corruption, which is problematic for economic development. When compared to other developed and developing countries, we can find Bosnia and Herzegovina at the same level, and we have advanced to Macedonia, Moldova, Ukraine, and Russia, all of which have a higher ranking. The information is displayed in the graph 3.

Corruption has a number of negative consequences, including the expulsion of investors and the demotivation of existing enterprises. The "Ease of Doing Commercial Rank" index assigns a score to each country based on how the regulatory framework protects business activity and property rights. The regulatory framework in countries with a higher score (1 to 20) is simpler and more business-friendly. Albania's standing in the Region - Europe & Central Asia is depicted in the graph below. The important indicators of Albania's ease of doing business.

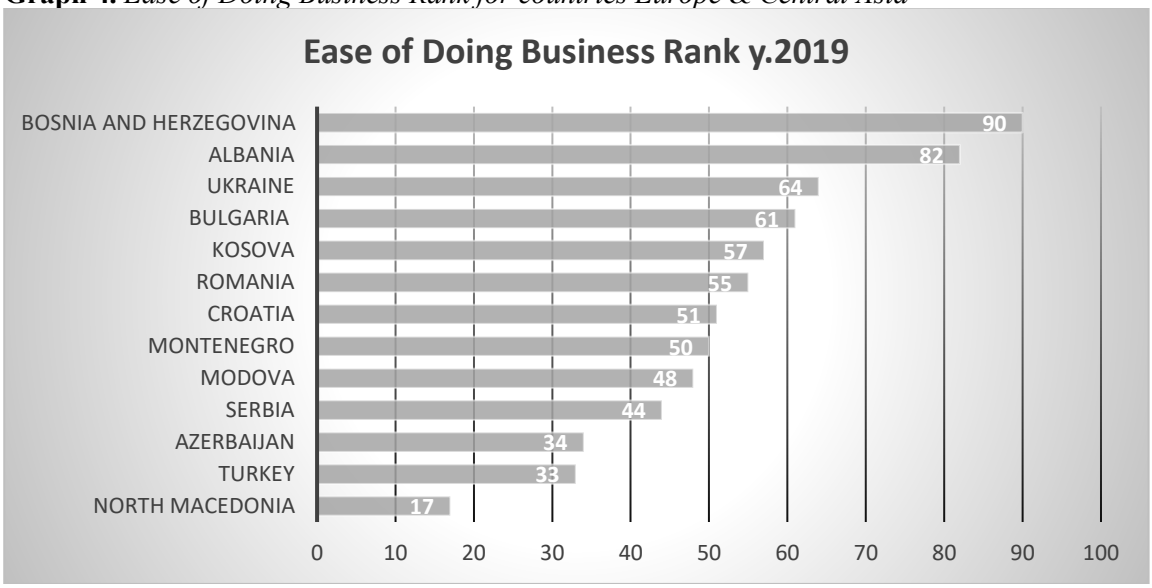
[5] https://ec.europa.eu/neighbourhood-enlargement/system/files/2020-10/albania_report_2020.pdf

Graph 3. *Comparing the levels of corruption in developing countries to Albania's.*



Source: Trading Economics, Corruption Rank

Graph 4. *Ease of Doing Business Rank for countries Europe & Central Asia*



Source: The World Bank – Doing business "Measuring Business Regulations"

According to Transparency International's Global Corruption Perceptions Index issued in January 2021, public corruption perceptions have deteriorated in most Southeast and Central European countries.

In the Western Balkans, Bosnia & Herzegovina and Northern Macedonia were once again placed lower, with a score of 35 out of 100 – where 100 points indicates a spotless environment and 0 points denotes the polar opposite – and share 111th place in the list of 180 countries.

Northern Macedonia declined five places from 106th position last year, while Bosnia and Herzegovina dropped ten places from 101st place last year.

Serbia and Kosovo's rankings have also dropped since 2019. Serbia dropped one point, from 39 to 38, and was rated 94th in 2020, down from 91st the year before.

Kosovo was awarded 36 points and ranked 104th, down three places from the previous year.

Croatia finished with the same score (47 points) and position (63rd) as last year. Montenegro had the same score (45 points), but was ranked 66th instead of 67th.

Albania raised its total from 35 to 36 points, and moved up from 106th to 104th place. Turkey was rated 86th, up from 91st in 2019, with a score of 40 points (up from 39 points in 2019).

Albania gets a low score on the corruption indicator, and it is widely regarded as one of the most corrupt countries in the region. The OSCE's Bernd Borchardt stated, "The phenomenon of corruption in

the country continues to be a severe problem." He suggests that the mechanisms for enacting anti-corruption reforms be maintained in accordance with international recommendations and the United Nations Convention against Corruption's duties.

Corruption is a phenomenon that exists in both developed and developing countries in varied degrees and forms. We can highlight a few of the primary variables that enhance the prevalence of corruption in the economy:

- Low civil servant pay
- High level of informality
- Impunity culture
- Lack of robust administrative supervision
- Combining official responsibilities and personal interests
- Incomplete legislation
- Ineffective judicial system
- High level of informal economy

Corruption has detrimental consequences in many aspects of the country's economic, social, and political life. It has high costs and encourages bribe competition rather than quality competition in goods and services. It obstructs the development of a regular market and, more importantly, economic and social progress, causing harm to developing countries like ours. Corruption causes revenue distribution inefficiencies, allowing less efficient contractors with stronger bribery skills to profit from government contracts. When the cost of bribery is factored into the price of the commodities produced, demand falls, the production system becomes one-sided, and consumption falls below efficiency levels. As a result, corruption lowers the population's general well-being. The cost of administration rises as a result of corruption (the taxpayer also has to pay bribes, often doing so for the same service). When corruption takes the form of payment, the total amount of money set aside for public purposes is reduced.

Negative economic consequences include:

- ✓ In corrupt countries, businesses are forced to expend some of their own funds to fight corruption, which reduces investment and GDP.
- ✓ Corruption suffocates free competition, particularly among small businesses.
- ✓ As competition dwindles, so does the quality of goods and services.
- ✓ State revenues are declining, but the shadow economy is expanding (informally).
- ✓ Where corruption is permitted, civil workers earn minimal salaries, and ordinary individuals are forced to pay to solve their concerns.
- ✓ Foreign investors lose faith in the government, reducing their contribution to the domestic economy.

3. Informal economy

The prevalence of the informal economy is one of the most serious issues confronting emerging nations. The less functioning a country's state and economic structures are, the lower the informal economy is expected to be. This is because such economies have had a legal framework and a high level of implementation, as well as complete and strict information systems that are put to the service of transparent methods of recording economic activities, lowering the rate of informal economy and increasing the responsibility and culture required at work. The International Labor Organization estimates that about 2 billion workers, or over 60 percent of the world's adult labor force, operate in the informal sector--at least part time.

The informal economy is a global phenomenon, but there is great variation within and across countries. On average, it represents 35 percent of GDP in low- and middle- income countries versus 15 percent in advanced economies.

3.1. The Concept of Informal Economy

Because different authors look at the topic from different viewpoints and propose approximate but varied definitions, there are many disagreements in the literature on the exact definition of the informal sector. Small units engaged in the manufacture of goods and services that are not registered as formal units are included in the informal economy, as are units that operate in the production of goods and services that are registered as formal units but only declare a portion of their activity volume.

Perhaps a better definition would be that the informal economy is that part of the "legal economy" (not prohibited or criminal) that does not adhere to the current legal framework and would be liable to taxation

if reported to the fiscal authorities. In any event, the informal economy is mostly associated with tax evasion and undocumented labor. The informal economy accounts for 10 to 50 percent of GDP, depending on the country; it is lower in industrialized countries and larger in developing and transition countries.

The informal economy is also known as the shadow economy, parallel economy, underground economy, or informal economy, and all of these terms are clearer after it is defined as a concept. The introduction of private benefits and public expenses is the most challenging component of reversing the trend of increasing the relative size of the informal market for a policymaker.

Each market participant in the informal economy benefits in a variety of ways, both directly and indirectly.: (a) Individuals typically obtain larger net wages as a result of taxes, allowing them to purchase private products and services at lower rates; (b) Without the costly and time-consuming interaction with government officials, businesses can produce more competitively; and (c) In exchange for the fulfillment (desires) of people who participate in and benefit from the informal economy, corrupt authorities and politicians earn additional private money (bribes). The accompanying costs, on the other hand, are all "public" in character.

3.2 The primary economic implications of the informal economy

The informal sector is one of the main obstacles to a country's economic progress. It's worth noting that the informal economy serves as a buffer for the formal economy, allowing the unemployed to find work and new firms to get started with the least amount of money possible. The informal economy has the impact of not only reducing poverty but also increasing the income of small companies. Informal channels also provide goods and services in regions where official activity are either unfeasible or unappealing.

The informal economy's consequences are basically over:

i. *Monetary indicators.* By raising the demand for currency in circulation, informal activities are more likely to be conducted in cash.
ii. *Participation in the labor market and how long it lasts.* If the number of employees in the informal economy grows, as does the number of hours they work, the rate of participation in the formal economy falls, as does the number of hours they work.
iii. *Official statistics.* Informal economic growth results in less trustworthy statistics and lower official economic growth rate figures.
iv. *Economic growth.* The fall of the informal economy has an impact on economic growth since tax revenues rise, resulting in increased government spending.
v. *Public spending.* An increase in taxes that has an impact on the government's ability to meet its spending obligations.
vi. *Organized economic crime.* Possibilities for converting a portion of the informal economy to a criminal economy, as well as financial support for crime.
vii. *Increasing* corruption through paying bribes to civil servants in charge of tax collection and control, resulting in corruption and distorting the state's operations.
viii. *Tax and customs administration capacities*
ix. *High taxes*
x. *Quality and consistency of legislation*
xi. *Inequitable competition*

3.3 Albania's Informal Economy

The informal sector first emerged in Albania during the early stages of the country's transition to a market economy, when the legal, institutional, fiscal, and regulatory systems lagged behind the growth of private enterprise. The collapse of the centralized economy's institutions, the resulting legal and institutional void, and the state's initial shortcomings in creating legal and fiscal institutions fit for a market economy all contributed to the instant existence of informal activity in Albania. At this time, the informal economy became one of the most important sections of the economy, as political interests affected by corruption discovered in informality the appropriate tool for illegally gaining vast quantities of money and ruining and bankrupting competitors and active parts of the business. There are several causes that have contributed to the growth of Albania's informal sector, but the most notable are:

- In the early stages of the transition, a large number of jobs were lost.
- Large-scale geographical shifts towards plain areas, primarily towards Tirana.
- The state administration is highly politicized, and policy interventions in economic decision-making are frequent.
- New and improved laws is being drafted, yet there is still opportunity for a large informal sector.

- Lack of faith in the system of institutions (legislation, administration, bureaucracy, etc.)
- Corrupt and inefficient administration
- Official institutions' failure to guarantee property rights
- Inadequate enforcement of laws and regulations
- High taxes, their complication and administrative abuses
- Society's awareness of the informal economy as a possible solution to their concerns
- Illegal work is unlikely to be recorded and punished.
- Realization of monetary transactions outside the banking system
- Uncertainty about investment

Albania has a significant level of informal economy, according to numerous research. According to Friedrich Schneider, professor of economics at Johannes Kepler University (2010), Albania's informal economy accounted for 32.9 percent of GDP in 2007. In 2013, the European Bank for Reconstruction and Development (EBRD) determined from a poll of business executives in Albania that the informal economy accounted for 40% of GDP, and that enterprises should engage with the informal economy to ensure the activity's long-term sustainability. The Albanian government announced in 2015 that the informal economy accounted for 50% of GDP, whereas the World Bank projects that 30-35 percent of the Albanian economy will be informal by 2021. According to the World Bank, the Covid-19 outbreak revealed a high amount of evasion, with undeclared employees and firms dodging the authorities.

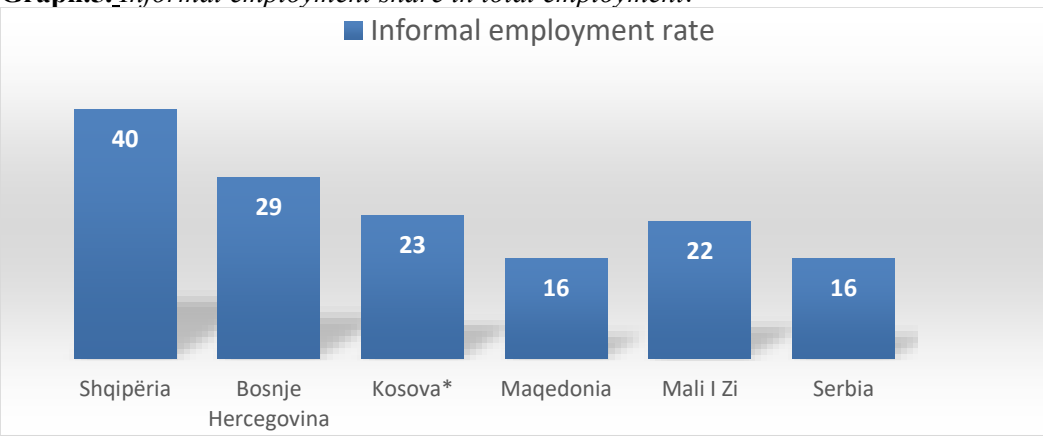
The government has made the fight against informality one of its top priorities in recent years. Despite the fact that initiatives have been done in this regard, the results demonstrate that registered enterprises, not unregistered ones, have the highest level of informality. According to the World Labor Organization's table, Albania has very high levels of informal employment in 2019, with 56.7 percent, followed by Armenia with 44.9 percent. ILO report of 2018, shows that 2 billion people, more than 60 percent of the world's employed population are in the informal economy, most of them in emerging and developing countries.

The informal economy has been and continues to be one of the major issues in economic development, where, despite its pervasiveness as a phenomenon, not all residents are aware of its implications.

Kosovo - After a 5.3% contraction of GDP in 2020 caused by the Covid-19 pandemic the economy recovered quickly in 2021 with an estimated growth of 7.7%. elevated rates of inactivity (above 60% in 2020), and informal employment (estimates range between 20 and 30%)

Albania- Labour market outcomes gradually improved over the last years and in 2019 Albania had the highest employment rate among Western Balkan economies (67%). The Covid-19 pandemic of 2020/21 led to a temporary reduction of employment (65% in spring 2020), but employment rates quickly rebounded to the old levels in late 2020. very elevated levels of informal employment (57% in 2019).

Graph.5. *Informal employment share in total employment.*



Source: Realized by various studies[6]

Although the Balkan countries have relatively high rates of informal employment, Albania has the greatest level of informality in the labor sector. In a special report on employment, the Regional Cooperation Council praised that the informal employment rate for all the Western Balkans economies is in

[6] Data were obtained from various reports, Regional Cooperation Council & ILO

the range of 20-30%, with exception of Albania, where the informal employment rate is above 40%. Following Albania, Bosnia and Herzegovina has the greatest rate of labor market informality, at over 29%, while Montenegro, Macedonia, and Serbia have the lowest rates. In all economies, informal employment is most prevalent in agriculture, since unpaid family workers, who are by definition informal, are mostly concentrated in this sector

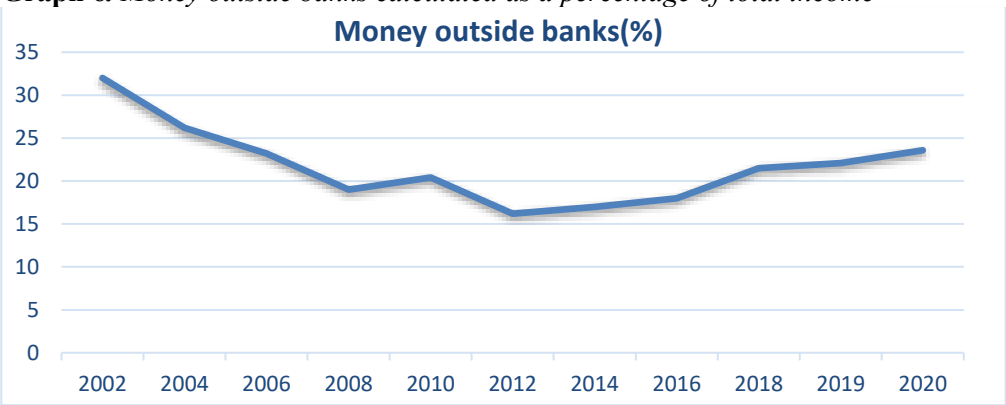
According to the survey, informal employment is most common among the most vulnerable groups, such as young people, women, and the workforce's senior age group.

The informal economy, on the other hand, slows economic growth. It primarily affects the economy's two key indicators, the unemployment rate and the amount of income, creating a big gap in official data and perhaps leading to ineffective macroeconomic policy.

At the same time, the informal economy reduces the collection of public revenues, reduces the collection of social and health insurance, motivates illegal work, reduces the quality of goods and services, and results in a stalemate in economic development.

While the rest of the world is heading toward a cashless economy, using physical money as little as possible, Albania is doing the exact opposite. In recent years, money outside of financial channels has expanded at an unstoppable rate. At the end of April 2021, money outside of banks reached new highs, totaling 2.85 billion Euros. According to Bank of Albania data, money that circulated outside of official channels climbed by 390 million Euros in April compared to April of the previous year, marking the greatest growth in the prior ten years in this time. Money outside banks climbed by 170 million Euros in April 2019, while money in unofficial channels increased by 243 million Euros in April 2020, when cash increased circulation due to the decrease of banking services during the Covid epidemic. The more currency that circulates in the economy, the higher the country's informality. This metric has risen in recent years, indicating that a big portion of transactions in the country are conducted outside of financial systems. Albania has a very high level of money circulating abroad when compared to other Eurozone countries, or even the region. banking channels.

Graph 6. *Money outside banks calculated as a percentage of total income*



Source:Bank of Albania, 2020

Albanian informality is a complex plan and one of the most challenging reforms to implement. Efforts to minimize informality necessitate additional effort, time, and funding.

4. Conclusions and recommendations

Albania has risen economically after the end of the communist dictatorship, from being Europe's poorest country in the 1990s to becoming a high-middle-income country. From the beginning of the economic and political transition until the present, corruption and the informal economy have been evident. Economic growth, capital formation, poverty, and inequality are all serious repercussions of corruption.

It would be naïve to believe that anti-corruption actions are the only thing that can keep the economy from collapsing. Initiatives show that the anti-corruption agenda may be an effective instrument for reducing the long-term systemic effects of corruption, which can be harmful to development in the long run. The prevalence of corruption has evident development implications. "The most significant thing is that hefty expenses are often not bribes, but rather basic economic inefficiencies that cause the utter breakdown and obstruction of administrative institutions and governance," according to Transparency

International (2000). Corruption has a wide-ranging impact not only in administrative, financial, and social terms, but also in the obstruction of accountable and democratic power, which is clearly harmful to all elements of growth.

To avoid corruption and informality, the government must implement reforms and policies. Efforts to reduce the informal economy can be viewed as a public benefit, but it's important to remember that it's not the worst thing that can happen to society. "Corruption is the actual enemy and the worst economic problem," Hillary Clinton says, "a phenomena that erodes society, depletes resources, and stifles economic growth." In all of Albania's progress reports, the European Union underlines to our lawmakers and public decision-makers the critical necessity to successfully combat corruption in the system, citing it as one of the top objectives.

Informality and efforts to reduce it are inextricably linked to the battle against corruption as a whole. However, this is not the case. Restricting informality does not imply that you have successfully combated all forms of corruption at the same time. While medium and lower-level civil workers "contribute" to supporting high-level informality, corruption that affects the public administration system as a whole, as well as informality in major corporations, is caused by corrupt top executives.

The government should be as effective as possible in reducing the informal sector by improving circumstances and making the official sector more appealing. The fight against evasion is a combat waged by the entire state, not just one institution. The gray economy must first be identified in order for initiatives to be effective. The informal economy need a defined plan to be stimulated; otherwise, it will address problems through corruption.

Of course, the fight against informality must be front-and-center, and the government must take steps to avoid tax breaks that encourage evasion, as well as expand capacity on a strategic plan that does not contain activities.

COVID-19 and associated measures to ensure physical distancing (mobility restrictions, partial or full lockdowns) frequently affect the most represented sectors and subsectors in the informal economy, affecting demand, imports, and access to raw materials and intermediate goods that are required for production. The wholesale and retail trade sector, which employs one-quarter of all non-agricultural workers globally but one-third in developing countries, is particularly hard hit, with the bulk of street vendors and other traders operating without a fixed site.

Formalization is not an objective in itself but a necessary condition to reach very important objectives. Without formalization, access to decent work remains an illusion. Formalization reduces poverty and leads to greater equality among people. The formalization of enterprises, including through increased productivity and better market access, contributes to their sustainability and fosters fair competition in national and international markets. The formalization of enterprises is also a condition for an adequate labour and social protection of the workers they employ. More broadly, formalization benefits society as a whole because it enhances the government scope of action, notably by allowing increased public revenues and strengthening the rule of law. It also contributes to fairer societies by distributing rights and obligations among its members more equitably. Furthermore, government support in times of crisis, such as the COVID-19 pandemic, is significantly facilitated when they are in the formal economy

Many local and foreign analysts, as well as numerous institutions, have made proposals on how to reduce corruption and informality in the country, beginning with the highest levels and neglecting small and large firms, which affect the economy in the long term. Formalizing the economy, fiscalizing it, and increasing the overall performance of the administrative system will keep the fiscal administration and enterprises apart.

Fair competition should ensure that everyone has an equal chance. Equal opportunities for all allow for a reduction in arbitrariness and a beneficial economic impact. Better cooperation between organizations such as the Insurance Institute, the Albanian Institute of Statistics, the General Directorate of Taxation, Public Health, and others is essential in the fight against cash flow and the decrease of the informal labor market. "Legalization" of money outside of banks, as well as the development and execution of particular and incentive employment policies in the formal sector, by establishing mechanisms that help employees control informality and prevent corruption.

Informal economies are more prevalent in countries with higher levels of corruption. Corruption is viewed as a means of building and consolidating state institutions, as well as promoting political stability, productivity, and law enforcement. To minimize corruption, the struggle should include increasing civic awareness and individual accountability, as well as strengthening and modernizing public administration.

References

Mema, F., & Preçi, Z. (1998). Informal Economy–A Barrier to a Sustainable Development. *Special number of magazine: Transition and Economy, Tirana, Albania*.

Shera, A. (2011). Corruption and the impact on the economic growth. *Journal of Information Technology and Economic Development*, *2*(1), 39.

"Systematic Corruption and Informality" 2015, Bujar Leskaj

Bardhan, P. (1997). Corruption and development: a review of issues. *Journal of economic literature*, *35*(3), 1320-1346.

Cheung, S. N. (1996). A simplistic general equilibrium theory of corruption. *Contemporary Economic Policy*, *14*(3), 1-5.

Djankov, S., Lieberman, I., Mukherjee, J., & Nenova, T. (2003). Going informal: benefits and costs. *The Informal Economy in the EU Accession Countries: Size, Scope, Trends and Challenges to the Process of EU Enlargement‖. Sofia: CSD*, 63-80.

Enste, D., & Schneider, F. (2002). Hiding in the shadows; The growth of the underground economy (No. 30). International Monetary Fund.

Huntington, S. P. (1968). Political Order in Changing Societies New Haven: Yale Univ.

INSTAT, Labor Force Survey, 2019

Klitgaard, R. (1988). *Controlling corruption*. University of California press.

Klitgaard, R. (1998). International cooperation against corruption. *Finance & Development*, *35*(001).

Mauro, P. (1995). Corruption and growth. *The quarterly journal of economics*, *110*(3), 681-712.

Mauro, P., & Driscoll, D. D. (1997). *Why worry about corruption?* (Vol. 6, pp. 1-19). Washington, DC: International Monetary Fund.

Myrdal, G. (1971). The challenge of world poverty: a world anti-poverty program in outline. *Science and Society*, *35*(2).

Papa, E. (2007). Tregtia e Sovranitetit Shtetëror: Forcimi i Ekonomisë Informale në Shqipëri. *Polis*, (3), 7-12.

Shleifer, A., & Vishny, R. W. (1993). Corruption. *The quarterly journal of economics*, *108*(3), 599-617.

Schneider, F., Buehn, A., & Montenegro, C. E. (2010). New estimates for the shadow economies all over the world. *International Economic Journal*, *24*(4), 443-461.

Thomas, J. (2001). What is the informal economy, anyway? *SAIS Review (1989-2003)*, *21*(1), 1-11.

Webster, C. (2007). Corruption and the smallholder: a review of current literature and research.

ISBN: 978-2-931089-30-9

Human resource management as a competitive advantage instrument in tourism and hospitality

Federico DE ANDREIS*
University Giustino Fortunato - Italy

Ubaldo COMITE
University Giustino Fortunato - Italy

Federico Maria SOTTORIVA
University Giustino Fortunato - Italy

Abstract: The tourism and hospitality industry represent one of the main pillars of the economy of many countries, being responsible for employment and GDP (Baum, 2015; Davidson et al., 2011). The industry involves many different organizations, responsible for different activities, who collaborate and benefit from each other for a common purpose: offering a high-quality service to customers (Baum, 2015; Kusluvan et al., 2010).
The evaluation of the quality of the service provided is possible by analysing the degree of satisfaction of the guests; therefore, the product offered by the industry is made of an intangible nature.
Thanks to the strong bond between the customer experience and the interpersonal relationships between users and employees, human capital is identified as the core element for the competitiveness of the tourism/hospitality organisations.
A correct management of human resources, based on policies focused to enhance and train the single person, both humanly and professionally, can positively influence the customers experience, fostering loyalty and improving the perception of the service itself.
This paper offers a literature review on the human resources management in the tourism/hospitality organisations, analysing the central role of human capital and how it could be strategically managed.
Finally, the empirical evidence of the best practices of a tourist company, will demonstrate how the strong engagement of the human resources in a real tourism organisation may contribute to create competitive advantage.

Keywords: Hospitality management, service management, human resources management, tourism.

1. Introduction

In more recent years, attention has been focused on the investigation of human resources management, in an effort to highlight how a well-managed human capital can have a favourable impact on the companies.

The touristic sector, in detail, is a highly diversified economic sector and its product is of an immaterial nature. The level of service quality, on which the customer's satisfaction with the experience depends, is directly linked to the interplay of the personal interaction between the supplier of the service. Therefore, the role of HR becomes even more relevant and it is now imperative to follow business models that valorise the individual person in the work and cultural context, in view of enhancing the company's chances of growth.

* Corresponding Author: f.deandreis@unifortunato.eu

The purpose of this article is therefore to conduct a detailed review of the relevant literature on the topic and then delve into the topic of HR in the field of tourism and accommodation. It will then present the a business case study, showing why the favourable strategies implemented are to be considered a case of best practice. In synthesis, the objective of the article is to reply to the questions below:

RQ1. What is the function of HR, in the sense of both workers and customers, in the tourist and accommodation industry?

RQ2. What makes human resources so important?

RQ3. What might be examples of best practices to adopt?

This article helps to enlarge the literature on the subject of organizational achievement in respect of HR in the tourism business and is organised as described below. The background to the literature is highlighted in section 2. Subsequently, in section 3, the Club Med case study is introduced by means of a descriptive analysis of the strategies adopted. Lastly, section 4 discusses the connection that exists between HR management with competitive advantage explaining that a successful business model appears to meet the needs of different types of both primary and secondary internal and external stakeholders, thus providing both value and competitive advantage.

2. Research Background: hospitality and human resources

The hospitality tourism sector is the key economic drivers of national economies today, attracting a variety of organisations (Baum, 2015; Kusluvan et al., 2010), such as hospitality establishments, foodservice businesses, tour agencies, etc. Moreover, also other domestic businesses are driven indirectly by the guest visit, thus fostering the development of the domestic industry.

Although these intricate businesses determine value internally, at the same time they are part of a broader chain where the enterprise delivers values throughout a complicated succession of actors (Christian, et al., 2011). As a matter of fact, in the most advanced economies of countries, both developed and developing, the hospitality industries fulfil an increasingly important role in terms of both jobs and GDP. (Baum, 2015; Davidson et al., 2011).

Up to now, not much research has been done on strategic HR management methods and systems for hospitality and tourism companies, however many researchers consider HR to be one of the most important key factors in making businesses competitive.

"People make a difference in competitiveness and business performance when they are driven and handled by a top management team that cares for them, nurtures their growth and valorisation" (Tesio & Garbellano, 2010).

This citation demonstrates not only the relevance and focus of HR in any industry, but also the fact that they must be optimally handled, both professionally and personally.

Tourism and hotel organizations accordingly should invest in the training and ongoing development of HR, provide attractive pay, establish fair and results-based systems of performance assessment and staff incentives, build up or reinforce leadership skills of their management, and redesign their work processes to give employees the chance to practise their skills independently and build up new competencies in the performance of their work thereby reducing pressure.

To investigate the phenomenon of tourism from both an economic and managerial point of view, it is essential to pinpoint the major trends that have emerged in the sector in the last few years.

A primary consideration is the increased understanding tourist's role, whether as a host or as a consumer. It thus appears in several sectors at the same time, rendering the analysis of demand and satisfaction of needs more articulated. The needs of customers are driven primarily by subjective, emotional and or socially motivated factors, as they increasingly seek unique and significant experiences (Tsiotsou, Ratten, 2010).

Further elements that make demand more sophisticated are the increasing ageing of the population, the consequently improved life expects and quality of life, the resulting high mean buying purchasing capacity and the increased availability of time.

Consequently, the tourism and hospitality industry's most important challenges from a managerial perspective include the development of staff competence and professionalism and their ability to make the guest experience exciting and memorable (Bharwani, Jauhari, 2010).

However, looking at the recent business reality of the sector, a completely opposite situation emerges. A tendency is too often to underestimate the skills and expertise of the HR involved in the recruitment process and later in the employment relationship.

In these years of the pandemic, state grants for temporary workers and other benefits have encouraged the decline in demand for labour in this area (Sun et al., 2022) and many hospitality establishments are having difficulty in utilising resources, particularly from a contractual point of view. Thus, it generates an unexciting work environment, creating a perception of inappropriateness and a sense of lack of appreciation in workers, making them not perform at their best (Rahimic, 2019).

Furthermore, investing in the internal training of employees, through courses and coaching with more experienced figures, requires the expenditure of huge resources (in terms of costs, time and personnel) by the accommodation facilities. The fluidity and dynamism of the market, in a context closely linked to seasonality, this investment in human resources can be not very profitable, convincing the entrepreneur to adopt other positions (Butler, 1998).

Human resources management is defined as an integrated system of complex and interconnected activities and tasks with the aim of guaranteeing a correct number and group of employees, their training, their skills, their interests and the motivations necessary for achieve strategic development goals, sustainable competitive advantage and organizational success.

The management of human resources must guarantee the development of human potential (planning, attraction and recruitment, selection, arrangement); the maintenance of human resources (health and safety, organizational culture, employee loyalty, employee services); knowing how to motivate and reward human resources (monitoring and evaluation of work efficiency, motivation, gratification, benefits) and, finally, investing in training and professional development (education and training, human resource development, career advancement, executives) (Bahtijarević-Šiber, 2014).

The purpose of human resource management is to ensure a competent and quality workforce, through the creation of a stimulating work environment. Staff satisfaction will be the key element for the success of the organization, increasing its competitiveness. Especially in the tourism industry, these characteristics are fundamental, as work is a high-intensity activity based on the quality of the personnel responsible for the products or services offered (Belias et al., 2017).

To understand the role of human resources within organizations, there are various theoretical models; the reference model for the tourism industry is the "Resource Based View". This approach focuses on the internal competitive advantage factors of the company by describing how human resources can contribute to the maintenance and further development of this advantage (Barney et al., 2001).

Human capital is part of the organizational resources and it is articulated "together with the skills possessed by people, in their relationships and in the values they carry" (Fontana, Caroli, 2013). Therefore, each particular business strategy requires a unique set of requirements related to the knowledge and skills of the staff, obtainable only through correct human resources management policies. To ensure that human capital allows the company to acquire a competitive advantage, it must be characterized by high competence, which translates into performance thanks to the high motivation generated by the positive working environment. Human capital and its strategic management by the organization are key elements for improving the assets of

an organization and therefore represent a source of sustainable competitive advantage (Pasban, Nojedeh, 2016).

Tourism and hospitality are therefore service companies, in which the relationship between corporate human capital and customers is a fundamental factor in the provision of quality services.

Sometimes different types of companies are integrated into a single production unit. In fact, a single tourist organization will be able to simultaneously deliver both intangible services and tangible products, such as the catering service featuring food and drink.

The elements that contribute to the company's competitiveness are therefore both internal and external to the organization (i.e. the local procurement system), but the internal elements will always be responsible to characterize the customer experience. Human resources are therefore accountable for the quality of the consumer experience and their knowledge and skills become crucial for customer satisfaction and loyalty, as well as for the perception of the service itself and, consequently, of the image of the organization (Bozzato et al., 2021).

People are therefore a fundamental element of any organization and as such should be valued (Garbellano, 2009). It is necessary to favour the process of " resources humanization " through which the management considers the "person" before the "professionist" using policies that allow to increase staff satisfaction and to create a motivational climate in the working environment. Human resources, since they are a fundamental part of the organizational context, can constitute a competitive advantage if used to the extent that best suits the company.

Further deepening the internal economies of service organizations, focusing on human resources, it is possible to classify companies according to the efficiency of their production process, characterized by the degree of contact with the customer during the provision of the service, defining customer contact as the time during which the customer is physically present in the system compared to the total production time. In the case of the tourism industry this contact appears intense, generating a high level of uncertainty in operations.

The customer brings with him a series of subjective elements that can alter the production process; therefore, companies must be able to manage this type of relationship with the consumer (Chase, 1979). The effectiveness of this interaction reflects the customer satisfaction, so human relational skills are the best tool to reduce operating costs.

This axiom is the basis of the centrality of human resources in their role of creating competitive advantage, which can only be achieved through the development of staff involvement. Continuing with the classification and segmentation of the multiple service activities, it is possible to identify the critical elements to monitor (Thomas, 1978):

- for service organizations relating to equipment in intensive contact with the customer (eg passenger transport), the critical element is the interface with the user;
- for organizations providing guidance services on equipment, but with a low intensity of relationship with the customer, the critical success factor is the ability to oversee the technology of the process with a focus on reducing the cost of providing the service with the same amount of offers;
- for service organizations relating to people with low customer relational intensity, the key element to focus on is that set of professional skills of the staff to achieve high levels of efficiency;
- for “people based” service organizations with high customer contact, it is necessary to supervise the professional skills of the personnel that guarantee the effectiveness of the interaction with the customer.

It is therefore evident that in service companies, and therefore in tourism companies, all these aspects are present and constitute value; the tools, logics, processes, cultures and values that strategic management has expressed in manufacturing must be used with greater attention and finesse, and with a different and higher level of sensitivity (Morais et al., 2004).

3. Best practices implemented by Club Med

The international tourism industry has assumed a preponderant dimension in the world economy.

There have been three fundamental accelerators that have transformed the travel experience into something extremely relevant, both socially and economically, and that have given it the title of "industry," even in the absence of machinery and assembly lines: curiosity about the elsewhere and the other, the rise in average per capita income, and the evolution of means of transportation that gradually shortened distances.

As seen, most researchers agree that people are a key strategic resource for the competitiveness of hotel tourism organizations. The spread of strategic personnel management practices and policies in industry organizations appears to be a driver of competitiveness.

To deepen the importance of human resources in the tourism industry organizations, the best practices offered by a case study, Club Méditerranée will now be presented, with the aim of demonstrating through a real example how it is possible to obtain the stakeholders' satisfaction and therefore a competitive advantage thanks to the involvement of human capital and its correct management.

The "Club Med" is a French company that provides services for tourism founded in 1950 by Gerard Blitz. The company was one of the first to adopt the all-inclusive formula, revolutionizing the holiday experience and offering a new version based on the concept of shared experience and characterised by a unique style. Until the 80s the Club Med was the reference agency for family holidays; the continuous increase in customers and destinations made it necessary in 1985 to transform it into a fully-fledged company. It was then listed on the stock exchange and several parallel businesses related to it were launched, such as gyms and travel agencies (Anderson, 2009).

Due to fierce competition and the general crisis in the tourism sector caused by the terrorist attacks and the great tsunami of the 1990s, the Club Med went through a phase of decline, ceasing to exist as a club in the legal sense. A new strategy was therefore studied to bring attention back to tourist villages and raise back from troubles. The Club has therefore decided to re-evaluate its initial concept, focusing on the high-end activities of the global market and thus becoming the global leader in multicultural and all-inclusive holidays. This approach has allowed the company to nowadays boast about 70 resorts around the world and a cruise ship.

In order to study how the club med model is actually responsible for such success we will analyse opportunities and threats present in the market, both in the product and in the price, using the SWOT analysis tool (strengths, weaknesses, opportunities, threats). The results of this analysis will help to understand how the centrality of human resources has been a precious element in enabling the organization to establish itself.

Defining the opportunities, the market is characterised by a strong development of the tourism and hospitality sector, the need for flexible offers by customers, the strong development of the e-tourism, with the relative possibilities for innovation, and new consumers' needs and expectations.

In contrast to the opportunities there are threats, characterized by an increase in competition, by more aggressive competitors proposing the same offers with the consequent need to develop more specialized and personalized offers according to the different types of customers.

Based on these elements, the Club Med has focused on diversification of the offer and the evolution of the product, taking care of the infrastructure and quality of the services offered in the villages down to the smallest detail.

Among the weaknesses there are the price, which is not accessible to all consumers, and some issues in accessing the infrastructures, caused by opening hours. The all-inclusive offer enables the customer to know exactly how much he will spend but, on the other hand, it could limit the guest's flexibility. (Julien, 2012)

Thanks to the ability of the staff to adapt the offer according to the needs of the market, the Club Med thus obtained numerous financial successes and non-economic awards, always involving and satisfying all stakeholders.

By analysing the management of human resources and the methods used by Club Med to satisfy stakeholders, it can be seen that an important strategy for involving people has been applied, as well as detailed marketing and distribution strategies. Specifically, the family spirit was recreated in the corporate environment, uniting a set of strangers, such as employees, guests and local communities, and developing a strong sense of belonging and making them feel caring for themselves (Hu, Olivieri, 2020).

Thanks to these management policies, Club Med has often found itself in advantageous positions in relations with stakeholders such as guests, suppliers and employees.

Through the enhancement and training of staff, Club Med makes use of employees with strong interpersonal skills, who give particular importance to details and reduce cultural distances thanks to the knowledge of languages. In this way it is able to provide guests with a high level of services, making their holiday experience unforgettable.

Competitive advantages relate primarily to the ability to attract substantial interests from suppliers and business partners. For example, airlines offer special fares designed specifically to transport Club Med guests to and from their destinations.

The development of tourist villages in economically less developed territories represents job opportunities for local communities, which are willing to offer important benefits and low-cost financing in order to attract this type of activity.

To make the most of the opportunities present on the global market, Club Med has acted on human resources at the level of employees, customers and local communities, through three registered brands:

- G.Os, represented by the organizers of the Club Med activities. These people are real inhabitants of tourist villages, professionals with strong interpersonal skills who take care of the entertainment activities;
- G.Es, represented by the workforce made up of the local community. They are mainly responsible for the quality of the stay in tourist residences and cover the roles of cooks, waiters and administrators;
- G.Ms, represented by the guests, described as real members to favour the creation of the atmosphere of conviviality typical of Club Med.

This business model is totally based on the centrality of human resources and their enhancement, as a growth factor for the organization. It is therefore people who make the difference both in terms of competitiveness and business results and the importance of their involvement is evident (Tesio, Garbellano, 2010).

Club Med has been very careful to give the right importance to people, both as professionals and as individuals, making sure that the values of the organization coincide with those of the people who make it up.

4. Conclusions

Only few studies on the importance of a strategic human resource management in the tourism/hospitality industry have been conducted, as limited is the attention paid to the issue by real organizations' policies. A careful analysis of the topic highlights how the enhancement of human capital may positively contribute to creating a motivated, competent and capable workforce.

The empirical evidence from the Club Med case study proves how the adoption of human resources' oriented policies may have a positive influence on different performance factors such as the quality of service provided and the customers satisfaction and loyalty.

The paper also investigates the possible benefits of investing in human capital; proposing active customers' engagement and staff training in a human centered environment can generate better business performance and a sustainable and significant competitive advantage in the long run.

Paying particular attention to peoples' needs, the application of such policies may contribute to generate both financial and operating advantages, in the supply chain procurement activities and in the establishing and subsistence of strong relations with local communities, making the activity easier to conduct and more economically sustainable.

References

Anderson W., Juaneda C., Sastre F. (2009). Influences of pro- all-inclusive travel decisions. Tourism Review, 64(2), 4-18.

Barney J.B. (2001). Resource-based theories of competitive advantage: A ten-year retrospective on the resource-based view. Journal of Management, 27(6), 643-650.

Baum T. (2015). Human resources in tourism: Still waiting for change? – A 2015 reprise. Tourism Management, 50, 204- 212.

Bahtijarevic-Siber F. (2014). Management ljudskih potencijala, Human resource management. Golden marketing, Zagreb.

Belias D., Trivellas P., Koustelios A., Serdaris P., Varsanis K., Grigoriou I. (2017). Human Resource Management, Strategic Leadership Development and the Greek Tourism Sector. In Katsoni V., Upadhya A., Stratigea A. (eds.) Tourism, Culture and Heritage in a Smart Economy, 189-205. Springer, New York.

Bharwani S., Jauhari V. (2010). An exploratory study of competencies required to co-create memorable customer experiences in the hospitality industry. International Journal of Contemporary Hospitality Management, 25.

Bozzato S. (2021). Turismo comunità territori. Frontiere di sostenibilità. Mimesis, Sesto San Giovanni.

Butler R. (1998). Seasonality in tourism: Issues and implications. The Tourist Review, 53(3), 18-24.

Chase R.B. (1979). Where Does the Customer Fit in a Service Operation? Harvard Business Review, 56(6),137-142.

Christian M., Fernandez-Stark K., Ahmed G., Gereffi G. (2011). Workforce Development in the Tourism Global Value Chain. Durham: Center on Globalization, Governance & Competitiveness, Duke University.

Davidson M.C.G., McPhail R., Barry S. (2011). Hospitality HRM: past, present and the future. International Journal of Contemporary Hospitality Management, 23(4), 498-516.

Fontana F., Caroli M. (2013). Economia e gestione delle imprese. McGraw Hill, Milano.

Garbellano, S. (2009). La crescita delle Faculty interne per lo sviluppo del capitale intellettuale delle aziende. Quaderni di Management, Milano.

Garbellano S. Tesio V. (2010). Un futuro per la funzione risorse umane: verso una nuova leadership professionale. Franco Angeli, Milano.

Hu, L. Olivieri, M. (2020). Social Media and Omni-Channel Strategies in the Tourism Industry: An Analysis of Club Med. In Martínez-López F., D'Alessandro S. (eds.) Advances in Digital Marketing and eCommerce, 47-55. New York, Spinger.

Kusluvan S., Kusluvan Z., Ilhan I., Buyruk L. (2010). The human dimension: a review of human resource management issues in the tourism and hospitality industry. Cornell Hospitality Quarterly, 51(2), 171- 214.

Morais D., Dorsch M., Backman S. (2004). Can Tourism Providers Buy their Customers' Loyalty? Examining the Influence of Customer-Provider Investments on Loyalty. Journal of Travel Research, 42(3),235-243.

Pasban M., Nojedeh S.H. (2016). A Review of the Role of Human Capital in the Organization, Procedia - Social and Behavioral Sciences, 230.

Rahimić Z., Črnjar K., Čikeš V., (2019). Seasonal employment in tourism organizations as a challenge for human resource management. TOSEE – Tourism in Southern and Eastern Europe, 5, 607-620.

Sun Y.Y., Li M., Lenzen M., Malik A., Pomponi F. (2022). Tourism, job vulnerability and income inequality during the COVID-19 pandemic: A global perspective. Annals of Tourism Research Empirical Insights, 3(1).

Thomas D. (1978). Strategy Is Different in Service Businesses. Harvard Business Review, 56(4), 158–165.

Tsiotsou R.H., Ratten V. (2010). Future research directions in tourism marketing. Marketing Intelligence & Planning, 28, 533-544.

ISBN: 978-2-931089-30-9

Consumers' willingness to use the smart tourism technology

Manuela MECE*
Faculty of Applied Sciences and Economics, Albanian University - Albania

Etleva MUÇA (DASHI)
Faculty of Economy and Agribusiness, Agriculture University of Tirana - Albania

Abstract: Recently, the tourism sector has become one of the dominant sectors globally that uses technology extensively. Daily activities in the sector include an immense variety of duties. With the development of technology and the internet people are more inclined to use the latest methods to conduct their activities due to the facilitations they bring. Everything is computerized, and data is processed automatically. These facts in tourism have given birth to the concept of "Smart Tourism" which can be characterized as a progress from traditional tourism. The idea that the tourism and travel industry can be beneficial for a country has led to the necessity of making tourist destinations as attractive as possible, both for one-time travellers and for experiencers. Developing the smart systems, it is important to know since the tourist product offered incudes such elements as: accommodation, food and beverage facilities, cultural heritage points of interest, attractions or transport, etc. (Niedbała et al., 2020). However, with such a data explosion, choices increase dramatically along with the risk of information overload. Thus, the need to understand the expectations and behaviour of tourists has become even more important to improve the whole tourist experience by providing the right service to the right users at the right time. The above facts have led to the creation of the concept "Smart Tourism", which can be progress from traditional tourism. On the other hand, as well in Albania according to the Albanian Institute of Statistics (INSTAT 2021), the tourism industry plays an important role in the economy and is a major and important resource for the development of the country. So, the Covid 19 has influenced the touristic activities in Albania after 2020. In these conditions Albanian consumers needs to be directed and award through smart technologies for their touristic activities. The main goal of the article is related with the frequency of using smart technology in the touristic activities and services in Albania. Even the smart technology is getting more and more important all over the world, in Albania this system remain still in the first stages.

Keywords: Smart technology, tourism, consumer, Albania.

1. Tourism importance in the global economy

The tourism sector, one of the largest sectors globally, is an essential component of the social and economic activity of many countries as it generates jobs, income for businesses and governments and growth opportunities. The tourism industry is constantly growing every year, reaching a number of 1.19 billion tourists in 2015, from 528 million in 2005, while it is expected to grow even more than 1.8 billion by 2030 (UNTWO 2011).

In 2021 statistics show that the tourism industry contributed directly by creating millions of jobs worldwide, especially after the difficult period of lockdown and travel limitations as for

* Corresponding Author: m.mece@albanianuniversity.edu.al

Covid-19. The idea that the tourism and travel industry can be very beneficial for a country has led to the necessity of making tourist destinations as attractive as possible, both for one-time travelers and for experiencers. The tourism sector, one of the largest sectors globally, is an essential component of the social and economic activity of a huge number of countries as it generates jobs and business opportunities.

As the tourism industry grows, we are witnessing an era of radical evolution of software ecosystems that allow access to an abundance of tourist-related data (Kontogianni & Alepis, 2020). This data may regard accommodation, food and beverage facilities, cultural heritage sites of interest, etc., along with the assessments, evaluations and suggestions generated by tourists. However, with such data explosion, the choices dramatically increase along with the risk of information overload. Thus, the need to understand the expectations and behavior of tourists has become even more important in order to improve the whole tourist experience by providing the right service to the right user at the right time. The above facts have led to the creation of the concept "Smart Tourism", which can be defined as progress from traditional tourism.

The tourism industry contributes directly by creating millions of jobs worldwide, especially after the difficult period of lockdown and travel limitations as for Covid-19 (McCabe & Qiao 2020). The idea that the tourism and travel industry can be beneficial for a country has led to the necessity of making tourist destinations as attractive as possible, both for one-time travelers and for experiencers. As the tourism industry grows, we are witnessing an era of radical evolution of software ecosystems that allow access to an abundance of tourist-related data (Kontogianni & Alepis, 2020). Developing the smart systems, it is important to know since the tourist product offered incudes such elements as: accommodation, food and beverage facilities, cultural heritage points of interest, attractions or transport, etc. (Niedbała et al., 2020).

Developing the smart systems, it is important to know since the tourist product offered incudes such elements as: accommodation, food and beverage facilities, cultural heritage points of interest, attractions or transport, etc. (Niedbała et al., 2020). The impact of contextual information on decision-making processes in a wide range of areas along with that of tourism has already been recognized by Jorro Aragoneses, Agudo, & García (2017)

2. Tourism development in Albania.

Albania enjoys a great tourism potential due to the geographical position in which it is located, the natural and climate richness as well as many historical and cultural aspects that are intertwined in it (Boboli, Muça 2022). For these reasons, our country has been classified in recent years by the international travel agency, as one of the most interesting tourist destinations in the world. The various forms of landscape that Albania holds, creates wonderful landscapes and points of interest for tourists. High mountains, beautiful hills, meadows, and river valleys as well as the long coastline intertwined together making it possible to develop different types of tourism. Given that tourism is one of the most important industries in the social and economic aspect of a country, its development should be of a great significance. Albania has a great potential for tourism development as it is a country with a strategic location in Southeast Europe, has numerous natural monuments and sites as well as archeological ruins with a rich history.

According to the Institute of Statistics of Albania (INSTAT 2021), inflows of foreign visitors in 2018 have increased with 15.8% compared to 2017, while the spending of these visitors (non-residents) in our country increased with 12.5%. In the period 2014-2018, the number of visitors in archeological parks, museums, and castles and other monuments was approximately 3 million people with an increase of 49.4% for 2018. During 2018, the number of visitors who visited the castle and other monuments had the highest annual average growth of 53.4%, followed by the number of museum visitors with 51.2%, compared to 2017.

Table 1. *Visitors in museums, archeological parks and castles, period 2014-2020*

Year	Number of visitors in archeological sites	Number of visitors in museums	Number of visitors in castle and other monuments	Total number of visitors
2014	175.472	135.578	93.194	404.244
2015	209.547	131.808	119.389	460.744
2016	230.188	154.965	164.544	549.967
2015	260.888	200.986	201.148	663.022
2018	377.835	303.963	308.656	990.454
2019	424.860	317.826	322.395	1.065.081
2020	78.552	49.288	62.627	190.467

Source INSTAT 2021

In 2020, the number of visitors who have visited museums, castles and other monuments has been approximately 2,000,000 people, decreasing by 6 times compared to 2019.

During 2020, the number of visitors who have visited archeological parks is about 790,000 and occupy 41% of the total number of visitors who have visited archeological parks, museums, and other castles and monuments, followed by the number of visitors to castles and monuments. others occupying 33%.

In the period 2014-2018, the number of foreign visitors with overnight stays (including visitors who stay at least one night in a hotel or other accommodation facilities, relatives, their homes, etc.) is about 21 million with an increase of 10.7% during 2018. While the number of daily visitors, for the period 2014-2018, is about 1.7 million, doubling during 2018, compared to 2017.

In 2020 according INSTAT 2021, the number of trips for personal or business purposes within the country, made by residents over 15 years of age in Albania was 2,920,287. The average number of overnight stays for completed trips is 3.97 nights. Personal travel accounts for 98.8% of total travel, while business travel accounts for 1.2% of them.

The highest concentration of domestic travel (personal and business), for 2020 according to the month of departure are recorded in: August (18.0%), June (12.9%), January (11.2%) and December (about 10.7%).

The economic impact of tourism in Albania was 21.2% of the GDP during 2019 (INSTAT 2021)and actually, the sector occupy nearly 7.7 % of the jobs in Albania (Tourism strategy data 2018)

3. Methodology

Based on the elements of this study, according to Robson (2003), we affect the data collection of the research and the methodology strategy. The data used are primary data, collected online in google form through a questionnaire drafted for the impact of technology on tourism and Albanians willingness for this change, and as well secondary ones from various official sites as well as theoretical concepts of the tourism sector, to build the full picture of the sector and ways that technology used in tourism has changed the impact of entertaining part of tourism to individuals.

The study was conducted through an online questionnaire to individuals mostly in the suburbs of Tirana, but also to residents of other regions of Albania. The sample is composed of 118 individuals with some traveling experience. Analysis of variance (ANOVA) used to analyze differences between means, based on the law of total variance, where the variance observed in a given variable is divided into components that are attributed to different sources of variation. In its simplest form, ANOVA provides a statistical test of whether two or more population averages are equal, and therefore generalizes the t test beyond the two averages.

ANOVA model classes

There are three classes of models used in analysis of variance, and these are described here.

1. Models with fixed effects - The fixed effects analysis model (class I) applies to situations in which the experimenter applies one or more treatments to the subjects of the experiment to see if the values of the response variable change. This allows the experimenter to estimate the range of values of the response variables that the treatment would generate in the population as a whole.
2. Patterns with random effects - Random effects model (class II) is used when approaches are not set. This occurs when different levels of factors are sampled by a larger population.
3. Models with mixed effects- A mixed effects model (class III) contains experimental factors of both set and random effects types, with interpretations and analyzes suitable for both types.

Since ANOVA requires quantitative data in its analysis we focused on the nominal regression

4. Results and interpretations

After reviewing the theoretical and empirical literature and the availability of data, a clearer idea was created on the variables which should be considered for performing the empirical analysis. Our analysis focused on identifying consumer preferences in terms of smart technology. 72% were female and 28 % were male. The majority of the respondents were part of the young group since they are keener on the technology. As well the education level is linked to the level of education. From the results of the surveys, we come to the conclusion that the respondents have an average monthly income in the interval 60,000-100,000 ALL. An interesting fact is that nearly 70% of the respondents take vacations at least once a year and their vacations are linked with the coastal and mountain tourism.

From the results we conclude that the majority of respondents do not want to pay any additional units for tourism products that provide tourism services.

Modeling through Nominal Regression of dependent variable relationships "How much are you willing to pay more for tourism products that offer smart technology services" between the group of dependent variables - Gender, Age, Residence, Income and Do you use technology to book holidays it turned out that this connection was stable according to Chi-Square tests with a value of 30.138 in a df 30 and final p (value) 0.003. This connection was also confirmed by Pseudo R-Square equal to 0.524.

Likelihood Ratio Tests

	Model Fitting Criteria	Likelihood Ratio Tests		
Effect	-2 Log Likelihood of Reduced Model	Chi-Square	df	Sig.
Intercept	126.391[a]	.000	0	.
V2-gender	131.209	4.818	3	.086
V3- age group	132.665	6.273	12	.002
V4- income	135.277	8.886	6	.080
V6- booking activities online	134.568	8.177	9	.051

Source: Questionare

The function that confirms this model is for the B coefficients of -18.2 for the use of technology which shows that Albanians continue not to book vacations through smart technology, a fact which is confirmed by the coefficients 1,516 for the age group and 18.6 for income.

5. Conclusions

Based on the analysis and research conducted over the last 10 years on the Smart there are a considerable number of challenges that need to be addressed. Of great importance in this multidimensional sector, which attracts the attention of researchers and practitioners in various fields, is the goal to have concrete results regarding the effectiveness of such systems.

User privacy is another issue that would be quite interesting to address in practice. Moreover, the implementation of the proposed methods and systems with a large and diverse number of individuals can bring more challenges as well as valuable solutions.

A challenge that is very much related to the Smart Tourism is the fact that the size of the data is constantly increasing. Since the available information has reached a predominant point, Smart Tourism systems must successfully perform data filtering and personalization. The goal is to use only valuable information. When data is scarce or missing for some users, Smart Tourism systems should utilize the mechanisms in order to offer the best possible services. As more data is collected, more space is needed to store it and more sophisticated techniques to store, process and present it. A system that uses a map interface in order to present Points of Interest to its users will be overloaded and jeopardize performance in case the number of available points increases thus the time to upload them and present them to users as well will increase.

Another concern in the Smart Tourism is the privacy of users. While user modeling and personalization are fundamental components of a wide range of smart Tourism systems, individuals submit data that reveal many aspects of their personal life such as profile information, photographic identification, habits, locations, and so on. At the same time, a number of applications also automatically extract additional user-related data, commonly known as "digital footprints". As an example, the well-known Airbnb accommodation booking platform collects pages viewed by users, searches, location, ip addresses etc. from a plethora of other existing or proposed systems. These large pieces of information collected through a large number of sources mentioned above or others such as users' smartphones, social media channels, both those implicitly entered and those used to enhance the experience of tourism should be handled very carefully in order to preserve user anonymity and privacy of personal information.

Another challenge when dealing with a Smart Tourism destination is that users need sufficient battery power and processing on their mobile devices in order to use modern Smart Tourism applications, which, e.g., use components that consume GPS sources. To provide a solution to this issue and support Smart Tourism, for example, Barcelona offers USB ports for charging mobile phones in bus stop shelters.

Finally, an issue that should also be taken seriously is that some Smart Tourism applications , like those involving Augmented Reality, can impose on users with data overload. The challenge that arises here is to create systems that are worth the effort and time required to interact with them and the expanded tourism experience.

No less important challenge is tourism sector approach of technology in Albania. Today our country is struggling with it. Many foreign or local tourists do internet research or make reservations for their holidays. Many tourist businesses and not only, are those that operate online for reservations and there we can find their location or evaluations by tourists. Despite these, we have a lot of work to do to turn our tourism into a Smart Tourism

However, the problems are many, they take time of course, but the good sign is that work is being done in this direction, to make Albania a tourist destination in the Balkans and Europe.

References

A. Jasrotia, A.D. Gangotia Smart cities to smart tourism destinations: a review paper *Journal of Tourism Intelligence and Smartness*, 1 (2018), pp. 47-56

Albanian Institute of Statistics (INSTAT) (2021), *Tourism in figures*. Books. www.instat.gov.al

Boboli, I., & Dashi, E. M. . (2022). Exploring Tourist Expenditures of The Gjirokastra District in Albania: a Cluster Analysis. *Acta Scientiarum Polonorum. Oeconomia*, *20*(2), 13–20. https://doi.org/10.22630/ASPE.2021.20.2.11

J.L. Jorro-Aragoneses, M.B.D. Agudo, J.A.R. García (2017), Madrid live: a context-aware recomendar system of leisure plans. *2017 IEEE 29th international conference on tools with artificial intelligence*, ICTAI) pp. 796-801, 10.1109/ICTAI.2017.00125

Kontogianni, A., & Alepis, E. (2020). Smart tourism: State of the art and literature review for the last six years. *Array*, *6*, 100020. https://doi.org/10.1016/j.array.2020.100020

Ministria e Turizmit dhe Mjedisit (2018). *Tourism strategy.* Retrieved from https://turizmi.gov.al/16-areas-with-priority-in-tourism

Niedbała, G., Jęczmyk, A., Steppa, R., & Uglis, J. (2020). Linking of Traditional Food and Tourism. The Best Pork of Wielkopolska—Culinary Tourist Trail: A Case Study. *Sustainability*, *12*(13), 5344. https://doi.org/10.3390/su12135344

Robson, Colin. 1993. *Real world research a resource for social scientists and practitioner researchers*. Oxford, UK : Blackwell.

S. McCabe, G. Qiao. (2020) A review of research into social tourism: launching the annals of tourism research curated collection on social tourism. *Ann. Tour. Res*., 85 , Article 103103

UNTWO (2011) *International Tourists To Hit 1.8 Billion By 2030*. https://www.unwto.org/archive/global/press-release/2011-10-11/international-tourists-hit-18-billion-2030

ISBN: 978-2-931089-30-9

The food industry in southern Italy as part of tourism development

Giulia FURFARO*
student and freelance - Italy

Peppino DE ROSE
University Professor - Italy

Abstract: "Made in Italy" is an expression which recalls everywhere in the world the idea of Italian products known for their great quality and reliability. It guarantees the Italian originality of hand-made and industrial products, which have international certifications and recognition.
Often the reason for a visit to Italy is exactly that: the desire to discover and admire products made in Italy and look at how they are made, to get closer to the tradition and culture that generated them.
Every region of Italy has its particularity, a culinary specialty that fascinates tourists, to the point of leaving out the sea, the mountains or the city holidays to dedicate themselves to stays where food and wine are the keywords.
Although Italy has innumerable typical dishes, the South benefits from the quantity of food and wine.
For a good tourist product, it is essential that there are attractions or elements that encourage tourists to choose a specific destination as natural elements, gastronomic events or events specially created such as festivals or exhibitions.
Southern Italy has an inestimable wealth, but there is a need for professionalism and competencies, it is important that the assets we have are valued, accessible and usable. The paper will highlight the sector of "Food" one of the most important of the Made in Italy and the most relevant and the basis of the Italian economy; the role that the agribusiness has in Southern Italy and how this can be developed further. A clear example is the Mediterranean diet known all over the world for the advantages it brings and for the numerous studies carried out on it. Speaking precisely of the Mediterranean Diet whose products concern essentially the Mediterranean particularly in Southern Italy. From the food sector it will be more specifically analyzed by enogastronomy, from which enogastronomic tourism can be born. A significant opportunity for the development of tourist destinations in particular in the south of Italy.

Keyword: Food - Travel - Tourism - Development - Made in Italy

Made In Italy and the food industry.

The *Made in Italy* brand was born in the 1960s in countries such as Germany, France, Great Britain who applied the Made in Italy brand on foreign products to protect their domestic production and warn consumers about products to avoid.

However, they obtained the opposite effect, the Made in Italy became increasingly known and the italian producers have made it the emblem of the country, making it a symbol of originality, quality and innovation.

The industries whose brand is composed are: *Food, Fashion and Furniture;* The main elements in the Italian market and in the Made in Italy which have an essential role for the global

* Corresponding Author: giulia-furfaro@outlook.it

economy and the creation of opportunities offered by the export of Italian products known for reliability, quality and safety. Italy is called the home of craftsmanship.

The sector that can be defined as emblematic of the Italian economy and towing in the international context is that of Fashion that can be decomposed into: Clothing, Footwear, Eye-wear and Jewelry.

Food is the second most important sector.

Italy is one of the nations which stands out the most for the typical and quality food products, in addition to the typical products in Italy there are big international giants in terms of food like: Kinder Ferrero and Nutella. Ferrero was nominated as the company offering the products at the best value for money, taking the podium with three of its brands: Nutella (first position), Kinder (second) and Ferrero Rocher (third).

The Made in Italy brand has a strong export focus.

Despite the profound crisis that Italy experienced in 2008 and the periods of recession due to a variety of issues such as Brexit, Chinese protectionism, etc. the Italian economy succeeded in recovering and our "Made in" turned out to be more strong and solid than expected.

The pivotal sector of Made in Italy exports is definitely the agri-food industry, which has been in continuous growth since 2010 and is increasingly targeting more European and non-EU countries, in addition, an important business is becoming that concerning the wine sector

Italian which had its exploit in 2018.

As anticipated, the food sector can be considered the salvation of the Italian economy, and within Made in Italy it is the sector that emerges the most.

With more than 522 billion euros, the Italian agribusiness system, from agriculture to restaurants, accounts for 15 %[1] of national GDP, ranking first in Europe in terms of agricultural value added.

Even in the second year of the pandemic crisis, agri-food exports are still the most resilient sector. In fact, according to some data there is a historical record for exports of Made in Italy.

All this, despite the difficulties in foreign trade and various lockdowns distributed worldwide dictated by the pandemic. Yet we continue to grow, in fact a Coldiretti[2] estimate notes a double-digit increase in exports of typical Italian holiday products.

In general the food sector enjoys an excellent reputation in terms of "Made in Italy" and presents great export opportunities but unfortunately it is surrounded by strong competition, others disadvantages are the presence of small companies and a low capitalisation with limited profit margins.

Since Europe contains a very large presence of food and unfair competition[3] is increasingly stronger it has become necessary to adopt these measures to promote and protect original agri-food products, the European Community created the PDO *(Protected Denomination of Origin)*, PGI *(Protected Geographical Indication)* and TSG (*Traditional Speciality Guaranteed)* system in 1992 as brands that protect the originality of the products. Worldwide, the fake Made in Italy in the agribusiness has reached a turnover of 100 billion euros. To spread this phenomenon was mainly the need of Italian products abroad, which are however low cost , the center of expansion not have been poor countries but more developed ones such as Australia and the United States, countries that have represented the traditional historical destinations of emigration and where the Italian communities are more rooted.

[1] https://www.ansa.it/canale_terraegusto/notizie/mondo_agricolo/2021/01/22/il-sistema-agroalimentare-vale-522-miliardi-il-15-del-pil_519be349-cf1b-4396-9ea9-3adf376d5e60.html

[2] https://www.coldiretti.it/economia/commercio-estero-e-record-storico-export-cibo-italiano

[3] https://www.agrifood.tech/sicurezza-alimentare/italian-sounding-food-che-cose-e-come-funziona/

South Italy and the Mediterranean Diet

Italian agribusiness identifies itself globally as a unique model, which stands out from others for the typical and quality food products it produces. Italy in fact is the home of pizza, pasta, wine, good and healthy eating, from which the *Mediterranean Diet* was also born; One of the most important elements in the Food sector in Italy, in fact it is considered the pearl of Made in Italy, because it positively affects the lifestyles of people and especially on health.

The Mediterranean Diet has ancient origins; during periods of misery, farmers and the people in general ate what they cultivated, and this habit was transformed over time into a tradition that became rooted in the land and became a true proper way of life.

This food system was studied by an American physiologist and biologist Ancel Keys, he came to Rome in 1951 to participate in a conference on the state of world nutrition, organized by the UN. Keys was shocked when he discovered talking to Professor Gino Bergami, director of the University of Naples, which in Southern Italy heart disease was not a frequent problem in society. For this reason he decided to move later to Italy to study more closely this type of nutrition, his interest was to assess what effects these habits had on the most frequent diseases of the time.

In 1957 the scholar together with professor Bergami went to Nicotera (VV) in Calabria, where began a study on the population of the place and shortly after created the project "Seven Countries Study", which compared the diet of 7 countries: Finland, Japan, Greece, Italy, the Netherlands, the United States and Yugoslavia.

With this study Dr Keys came to the conclusion that the Mediterranean, particularly southern Italy, had a low percentage of diseases compared to countries like the United States and Finland thanks to the diet adopted, and that the farther away from the Mediterranean the higher the percentage of cardiovascular disease, diabetes, hypertension or ischemia.

At the base of the pyramid of the Diet there are many vegetables, fruits and cereals; following which milk and its derivatives, extra virgin olive oil and finally at the top we have the elements that provide a large number of proteins and are essential for the body such as meat, fish, legumes eggs. It is important, however, that everything is combined in a balanced way.

Our Mediterranean Diet has been confirmed as the best in the world and in fact in 2010 has been included in the list of intangible cultural heritage of humanity of UNESCO.

It becomes one of the greatest attractors of our earth, a business card that is bringing our excellence, peculiarities and nutritional value, to the rest of the world.

When we speak of Southern Italy we refer to an economic macro-region: Abruzzo, Basilicata, Calabria, Campania, Molise, Puglia, Sicily and Sardinia.

For years now, unfortunately, the South of Italy is characterized by economic difficulties and present limits of development, due to the numerous migrations of the 90s, the crisis of 2008 and the constant reduced entrepreneurial fabric. However, in the last three years 2015-2017, the agri-food industry has turned out to be excellent, with markedly positive trends compared to the central-northern regions. The agribusiness therefore, has all the credentials to become a strong point of the area and be a driving force of the southern economy, aiming at a high

positioning and a strong link with the territory.

Over the years related to food, more and more new terms have been created; "Enogastronomy", a territorial marketing that has a tourist vocation just like the term that expresses it.

When we talk about Enogastronomy we refer to the whole of Gastronomy and Oenology concerning a certain territory. Gastronomy is the study of the relationship between culture and food, while Enology is the science that studies transformation of grapes in wine, from the characteristics of grapes to the production of wine and the relative techniques. This creates a Europe of local products, food and wine, which are associated with an increasingly widespread phenomenon that is food and wine tourism.

Food and wine tourism has been defined as an integral part of Cultural tourism, since food and wine and culture are closely related.

Food industry in southern Italy as part of tourism development.

The food and wine tourist does not go in search only of the wine product or gastronomic interest, but he wants to know the origin of these products. They want to discover the area of origin, with which it will have a direct relationship with the local population, customs, and habits of the place; There will be total immersion of the tourist in the reality and culture of the place. This type of tourists seeks authenticity in their journey, through innovative proposals, such as guided tours on farms, culinary experiences in restaurants, festivals, cultural events related to food or wine. More activities and proposals there will be the greater the possibility of that particular place becoming a developed and frequented tourist destination and attraction. Obviously, at the end of the vacation if the food and wine experience has been positive the tourist can choose to: return to the place visited, recommend it to someone else or proceed to buy the typical products. Social media have a fundamental role to date, encouraging the sharing of personal experiences. Almost 80% of people publish photos of typical food or dishes, which is important for a good review of the food and the place.

According to the World Tourism Organization, this type of tourism is experiencing a strong growth, in recent years about 90% of tourists took part in activities related to Food and Beverage; In Europe there are about 600 thousand food and wine trips[4] while about 20 million are the trips that contain activities food and wine. The suggestions that are given by experts to overcome the difficulties of the future and maintain food and wine tourism active are:

- Always offer authentic and original experiences;
- Make it clear that food and wine tourism is not only based on the sale of products and local services, but is mainly concerned with providing innovative experiences that satisfy the customer or tourist;
- Practice sustainable food and wine tourism with the least possible waste;

Among the food and wine tourists the most popular regions in Italy are: Sicily, Tuscany and Puglia; While the most successful cities are Naples, Rome and Florence.

The nation of infinite flavors and the world's best-known dishes, from the famous Napoli's Pizza to Rome's Carbonara , tiramisu from the center-north , Cassata Siciliana , Mozzarella di Bufala , ice cream and a host of other dishes and typical products; Although Italy has many typical dishes is the South to be in advantage for the amount of food and wine products.

The South and tourism are strongly linked, but this is a phenomenon that cannot be improvised, on the contrary it is a sector that must be well structured and organized. For a good tourist product it is essential that there are attractors or elements that push the tourist to choose that particular destination and they can be natural elements, gastronomic or events created specifically such as festivals or exhibitions. South Italy has an inestimable heritage, but there is a need for professionalism and skills. It is important that the goods that the assets one has are valued, made accessible and usable, this requires Community projects and cooperation between public and regional authorities.

In Italy, the Strategic Plan for Tourism (PST) was created by the Permanent Committee for the Promotion of Tourism, with the coordination of the Directorate General for Tourism of the Ministry of Tourism. The Plan wants to promote a new way of tourist enjoyment of the heritage of our country based on: Innovation, Sustainability and Competitiveness.

[4] Il turismo enogastronomico in Italia, un fenomeno di successo - FormazioneTurismo.com

Tourism development must find the balance between competitiveness of the services offered and sustainability of tourism. Once the tourist product has been defined, the local authority will have to take care of the internationalization process that requires planning and coordination of all the elements that compose it and will be necessary skills regarding strategies, organization and management.

The success of a tourist destination is closely related to several factors, including international factors; the destination must offer a quality tourism product that is the result of coordination and local and regional collaborations. On the basis of the above we analyze the situation of the Calabria region located in the southern part of Italy.

Calabria is the result of the different civilizations it has hosted, as for the cultural heritage, there are indelible signs concerning the Greeks which created cities and colonized from the Ionian to the Tyrrhenian leaving also particularly important remains, some examples are the Archaeological Park of Capo Colonna, the temple of Hera Lacinia, the archaeological area of Locri Epizephyrii and others; When we talk about gastronomy in Calabria we mainly refer to the nduja of Spilinga, Tropea's onion, soppressata, extra virgin olive oils, etc.

Food&wine and culture are strongly connected and Calabria possesses both, a perfect combination for the development of the region since they are strong elements of attractiveness for tourists. The region could use as a point of restart and development both tourism cultural and food and wine tourism , or rather combine the two types of tourism and
become a super tourist destination.

Case Study

Mammola is a small village in southern Italy, in the province of Reggio Calabria.

It is located in a strategic position a few kilometers from both the sea and the mountain.

It was founded in the fourth century on the ruins of a Greek colony, but over the centuries there have been several civilizations and today it is characterized by the beauty of a medieval old town.

A village also known nationally and internationally for the specialty of "fish stockfish". Mammola, however, is not only this, it is rich in art , nature and culture. A combination of elements that if developed and managed well could make Mammola a tourist destination.

One example would be the creation of a *Destination Management Organization*, an organization that would manage and coordinate relations between the public and private areas with the goal of transforming Mammola from a small village to a tourist destination.

What could be the strategies to have an effective valorization and promotion of the territory? The main strategies should be differentiation and communication.

A plan should be created for the enhancement of natural and cultural resources that can all be accessible and usable. Then study the various types of tourism that could develop such as root tourism, proximity tourism and food and wine tourism.

References and Sitography

- ANCARANI F. SCARPI D., (2016), " Marketing Internazione. Nuovi Mercati per le eccellenze globali", Pearson,
- DE ROSE P. (2019) , "L'Europa per i Comuni", Aloe.
- DE ROSE P., De MARCO A., (2020), "Mezzogiorno nei Sassi. Da vergogna nazionale a patrimonio mondiale dell'umanità", Aloe.

- https://www.ansa.it/canale_terraegusto/notizie/mondo_agricolo/2021/01/22/il-sistema-agroalimentare-vale-522-miliardi-il-15-del-pil_519be349-cf1b-4396-9ea9-3adf376d5e60.html
- https://www.coldiretti.it/economia/commercio-estero-e-record-storico-export-cibo-italiano
- https://www.agrifood.tech/sicurezza-alimentare/italian-sounding-food-che-cose-e-come-funziona/
- https://www.formazioneturismo.com/turismo-enogastronomico-italia-un-fenomeno-successo/

ISBN: 978-2-931089-30-9

The role of public relations and services delivery in public institutions

Enkelejda HAMZAJ*
Lecturer - Albania

Qamile CACA
Lecturer - Albania

Abstract: Public relations is the transmission of the message to the public, through some communication tools in order to influence its opinion. Today, many public institutions understand the importance of public relations and reflected it in their organizational structures, which work for their development. In the Albanian reality, this field is evolving with galloping steps in order not only to inform the public but also to advertise the work of the institutions throughout their activity.
How do public institutions communicate with citizens today? Are Albanian citizens informed about various issues of interest to them? Are our institutions open to the media?
Information and transparency are the tëo main factors in the public institutions communication, implementing one of the articles of the LAW no. 139/2015 for the Information to Right.
The right to information indicates that all citizens should have access to the data sources of the general interest available from the public administration. Access to information requires good legislation and policies, clear institutional mechanisms to apply and legally independent institutions to strengthen it.
Also, the opportunity for information requires that citizens recognize and understand their rights and have the ëill to exercise them. Passing the information from government to citizens requires time and resources but it is of a particular importance as governance becomes more understandable and meanëhile the transparency and trust of their public increases. Since 2015 the way of communication in Albanian institutions has another approach, not only with the media communication but also through their ëeb sites or social netëorks.
Digital communication today is one of the challenges of the current government. Information technology has a determinate role in today's world and this is so evident in public relations.
Although the agility of information technology is both limiting and enabling, it directly urges efficiency and productivity. However, there are different opinions regarding the new standard on digital communication as it brings organizational changes but this change does not come as a result of technology but through the choices that individuals make using technology.
To understand this I will show that despite some shortcomings and gaps in some services, the role of public relations and digital communication have influenced the public administration approaches with the citizens. In this away Albania has maintained its leading position in the region.

Keywords: public relations, digital communication, public administration, public services

1. Public Relations

Public relations is the forwarding of a message to the public, through different means of communication, in order to influence its opinion. Today, many public institutions have realized the importance of public relations, which is reflected in the organizational structures, which gives life

* Corresponding Author: hamzajenkelejda@gmail.com, ledihamzaj@yahoo.it

to their development. In the Albanian reality, this field is being developed every day in order to not only inform the public but also to advertise the works of a certain institution for its activity.

Public relations are intertwined with several disciplines, marketing being one of them, where the effort is concentrated in influencing public opinion. Advertising is an important tool of the people responsible for marketing, but it is not the only one. As in MP, events and meetings are very useful and when well organized, create word spread from one to another, sufficiently, as well as provide free media coverage, things that are impossible to accomplish with traditional advertising.

In small institutions, Public Relations are performed by employees, who are not always specialized in the field. Meanwhile, in large organizations, Public Relations are organized at the departmental level in order to maintain and develop relations with the media and interest groups. In this sense, it is very important that the persons dealing with Public Relations in the institution, have knowledge of all areas covered by the institution.

In the Albanian reality, communication with the public is an almost new field. Although launched after 1990, it has only developed significantly in the last decade. In order to have an impact on public opinion, a professional public administration is required to work well and advertise its work well. In the years of democracy (1991 onwards) they have worked to increase the capacity of public administration. The improvement of the latter has come not only as an obligation of international agreements and provisions but also as a requirement to improve the capacities and modernize the service standards provided by the Public Administration.

This is a demand that also comes from factors such as: The political class, which knows that in order to approximate with EU standards, reforms that improve the organization and functioning of Public Administration need to be deepened: Public and private institutions also, which, in order to successfully carry out their functional tasks, must have sufficiently qualified human capacities, as well as modern technology and infrastructure: Public administration employees who provide the service and who feel the obligation that efficiency at work needs a preparation continuous theoretical and on the other hand the pressure of the public that is exerted directly on the officials and that increasingly requires a quality and ethical service[1].

On this topic we will discuss the role of public opinion and the services provided to citizens. Can any citizen receive information? How does the Albanian Administration act in the service of the citizens? What has changed in its services over the years? Public opinion is important for a certain government, not only for the trust of the citizens who voted and support it but also to be as transparent as possible with them during communication and provision of various services. In fact, communication, participation in decision-making, information and transparency are key elements in the way public relations works.

2. Public notification and consultation

Albanian citizens today have the opportunity to be informed through law no. 119/2014 "On the Right to Information"[2] and can participate in public consultations based on law no146/2014 “On Public notification and consultation”.[3]

[1] DAP (2012), Capacity building in Public Administration, p.7 https://www.dap.gov.al/images/revistat/revista11.pdf

[2] This law regulates the right of access to information produced or held by public authorities. The rules provided in this law aim to guarantee the public access to information, in the framework of exercising the rights and freedoms of the individual in practice, as well as the formation of views on the state of society and society. This law also aims to promote the integrity, transparency and accountability of public authorities

[3] This law regulates the process of notification and public consultation of draft laws, draft national and local strategic documents, as well as policies of high public interest. This law sets out the procedural rules to be applied to ensure transparency and public participation in policy-making and decision-making processes by public bodies. This law aims to promote transparency, accountability and integrity of public authorities.

Various institutions such as local ones are monitored by the Commissioner for the Right to Information. This institution with Order no. 211, dated 10.09.2018 has approved the "Model Program of Transparency for Local Self-Government Units", which is mandatory for 61 municipalities of the country from January 1, 2019. The Model Program has been drafted in accordance with Article 7 of Law no. 119/2014 "On the right to information" and adapted in the context of local self-government in accordance with and in implementation of the Constitution, law no. 139/2015 "On local self-government", law no. 146/2014 "On public notification and consultation", law no. 68/2017 "On the finances of local self-government", as well as law no. 8548, dated 11.11.1999 "On the ratification of the" European Charter of Local Autonomy "[4]

Monitoring allows assess to the level of transparency at the municipal level. The Office of the Commissioner for the Right to Information and Personal Data Protection, which oversees compliance with the provisions of the law on the right to information and in cases where their non-compliance is observed, assesses the offense and decides on the relevant administrative measure. The Office of the Commissioner in cooperation with UNDP Albania has conducted the first monitoring of the implementation of the Transparency Model Program for local self-government units during September 2019 and the results of this report have been sent to all municipalities. At the end of 2019, the Office of the Commissioner conducted a second monitoring noting that 57 out of 61 municipalities had approved the Transparency Model Program[5]. Although not 100% realized from 57 to 61 municipalities, this indicator remained high in our view as it shows that communication with citizens, public relations and the service they provide is at an increasing level in recent years. OECD studies have shown that there are citizens who would like to participate in political-legislative debates but for cultural, social, economic, linguistic, disability reasons, are not included due to lack of time or trust in politics and institutions.

In fact, one of the OECD[6] recommendations in 2012 for member states was that governments should define a clear consultation policy, identifying modalities according to which open and fair consultations should take place within the rule-making process. Regulatory Policy Outlook 2015[7] gives us an analysis of the progress made by many countries that have joined the OECD to improve the quality of legislation. This analysis focuses on the regulatory cycle in each country, examining in detail the key principles of good regulatory practices as set out in the 2012 recommendation: stakeholder involvement; analysis or impact assessment of regulators. These indicators give us an overview of the practices of different countries where each of them systematically measures the adoption of the practice, the methods of use, the quality of supervision and the level of transparency. This analysis shows that OECD countries have significantly improved the quality of regulation over the last two decades, putting regulatory policy at the center of governments' attention and turning it into a strong pillar of public sector reform.

3. Communication and electronic service

Citizens receive many services from public administrations although not all are organized in a way as to be understood by the public[8]. The public still spends a lot of time getting various

[4] Commissioner for the Right to Information and Personal Data Protection, (2021), Monitoring Report December 2020, p. 4

[5] Ivi, p 4

[6] OECD member countries: Austria, Belgium, Canada, Chile, Czech Republic, Colombia, Costa Rica, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israeli, Italy, Japan, Korea, Latvia, Lithuania , Luxembourg, Mexico, Holland, New Zealand, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, UK, USA.

[7] https://read.oecd-ilibrary.org/governance/oecd-regulatory-policy-outlook-2015_9789264238770

[8] Ministry of Innovation and Public Administration, (2015) Cross-cutting Strategy for Public Administration Reform 2015 - 2020.pdf, p.16

services. Since 2013, a number of services have started to be provided electronically, but there is no doubt that there is room for continuous improvement. The objective of the institutions should be the continuous simplification of services and the creation of a "friendly" approach for the public. One of the biggest challenges is the provision of modern services to citizens and the use of information and communication technology tools in all areas. Public opinion today has the opportunity to express its opinion through several platforms or electronic communication channels. For several years, communication channels have been set up with citizens, such as pyetshtetin.al, the Co-Government Platform, or receiving various services in e-Albania.

"Ask the State"[9] portal is an online platform, which aims to help citizens and various interest groups to have greater access and rather easily find public information. The portal also aims to facilitate the procedures for submitting requests for information to any responsible public authority as well as complaints in case of rejection of information requested by the Commissioner for the Right to Information and Personal Data Protection. Through the use of this portal, any citizen or interest group can simply electronically send requests for information or complaints in case of refusal. Another platform is "Albania we want"[10], an open platform of communication and interaction with citizens, which serves to learn in real time about issues of current political governance; to discuss with the citizens important reforms and measures, enabling their influence on the governing policies in each sector or on the progress of the work of each ministry and state institution; to fight corruption, promoting and guaranteeing the honest solution of community or personal problems of every citizen. This platform is a practical instrument of co-government with every ordinary person, who wants to be part of the effort for "Albania we want, Albania of citizens".

In the conditions of technological development and the commitment that Albania has taken in this direction, in order to provide as many public services online, the provision of information must respond to this development by moving in parallel. For this reason, in recent years the Department of Public Administration has paid special attention to the dissemination of information electronically, a way that reaches more citizens directly, saves time and avoids appearing in institutions. The implementation of the policy "transparent data" on the official website of DoPA continued throughout 2020, through the use of communication channels, various meetings in the framework of promoting the results of the Public Administration Reform. The definition of the main objectives / achievements which summarize the whole policy or achievement for the Public Administration Reform, was done through videotelling, photo-illustrative, thus following the global trend of providing information in a fast, attractive, simple and understandable way for the public[11]

According to DoPA during 2020, although in an unusual situation due to the pandemic, work has continued focusing on components / objectives such as: Public Administration Reform (SNRAP 2018 - 2022); Transparent merit-based recruitment procedure; IPA 2014 project "Implementation of civil service reform in public administration"; National Work Internship Program; Update and full functionality of the cooperation platform "administra.al" and the official website of DoPA; Promotion on social networks of trainings conducted or other activities. In fact, from May 1, 2022 in Albania began a new era of services without counters. Albania enters the elite of the most developed countries for digital governance, and is among the first to offer document services through the national digital platform. This is a historic station of the Digital Revolution and the implementation of one of the European objectives and directives.

[9] https://www.pyetshtetin.al/home/
[10] https://shqiperiaqeduam.al/
[11] Council of Ministers, Department of Public Administration (2021) "Annual Report 2020", 2021-05-25 DoPA Annual Report 2020.pdf

4. Conclusion

Looking at the situation today, the European Commission has published the annual report "E Government Benchmark", measuring the performance of E-Government, where Albania is rated as the first in the region for e-Government in 2019. This report assesses the use of information and communication technology in the public sector. The evaluation is done on the development of online public services with a focus on the citizen, the transparency of their provision and the inclusion of so-called 'key enablers', which measure the technical and organizational preconditions of the provision for electronic services such as electronic identification and interoperability between systems. This report includes 28 countries of the European Union as well as Iceland, Norway, Montenegro, Serbia, Switzerland, Turkey and Northern Macedonia and Albania, which is included for the first time in this annual report.

It is worth noting the ranking of Albania in the indicator "User mobile friendliness of services", the ease of using services on mobile devices, instead of 14th out of 36 countries. This indicator appreciates the fact that online services on mobile devices such as smartphones or tablets are convenient and easily accessible. In this indicator, Albania leaves behind all the countries of the Western Balkans as well as EU countries such as Estonia, Luxembourg, Sweden, Ireland, Portugal, Spain, the Czech Republic, Lithuania.

Another positive fact is the ranking in the 19th place out of 36 countries in the indicator "User usability", E-Services assistance, which measures the level of online assistance to users. In this indicator, all the countries of the Western Balkans lag behind Albania. In terms of transparency in public service delivery procedures ("Transparency of service delivery"), Albania is ranked 20th out of 36 countries.

E-Government is today a tangible reality in Albania and is managed and coordinated by the National Agency for Information Society (NAIS). The best example, as mentioned above, is the government portal e-Albania[12], the project of the Albanian government, which is based on online institutional interaction, is a typical example of digitalization of state services, which facilitate direct communication tools of individuals and authenticated in the system and a wide range of obstacles are avoided. The Albanian government, as a promoter of the transformation of physical services to online services, turns e-Albanian into an example by building a serious image of the state in order to restore citizens' trust in institutions.

We can say that today Albania is on the right path not only to improve online services in a way but to move to higher standards of the latter so that every citizen and every age has access of use in any service they require.

References:

- DAP (2012),Capacity building in Public Administration, p.7 https://www.dap.gov.al/images/revistat/revista11.pdf
- Commissioner for the Right to Information and Personal Data Protection, (2021), Monitoring Report December 2020, p. 4
- https://read.oecd-ilibrary.org/governance/oecd-regulatory-policy-outlook-2015_9789264238770
- Ministry of Innovation and Public Administration, (2015) Cross-cutting Strategy for Public Administration Reform 2015 - 2020.pdf, p.16
- https://www.pyetshtetin.al/home/

[12] https://e-albania.al/

- https://shqiperiaqeduam.al/
- Council of Ministers, Department of Public Administration (2021) "Annual Report 2020", 2021-05-25 DoPA Annual Report 2020.pdf

ISBN: 978-2-931089-30-9

Northern Europe Market Opportunities for Southern Italian Enterprises

Peppino DE ROSE*
Teacher at University of Calabria, Expert of International Markets - Italy

Martina ABATE
Student at University of Calabria - Italy

Abstract: The prospects for development and opportunities in the most promising sectors of the Benelux economy are based on the existence of strong economies with a constantly growing capacity for development. Benelux is an economic agreement established in Europe, composed by the Netherlands, Belgium and Luxembourg. The name formed by the initials of the countries is used not only to recognize the Economic Union, that was created, but also because of the geographical location of these northern European countries. Belgium, the nerve centre of Europe, is one of the most important Italian partners: the two countries are among the top ten markets in terms of volume of trade. The presence of Italians characterizes the Belgian territory , thanks to them it has spread the culture of Made in Italy increasing curiosity and the volume of purchases towards products from the Italian territory, Among the commercial activities involved in these exchanges are included: pharmaceuticals, machinery and especially agri-food products.Luxembourg, home to the most important European legal and financial institutions, is characterized by a strong Italian presence on the territory, from large industrial groups to commercial activities such as catering, high fashion and furniture. The cosmopolitan and multicultural environment is the wealth of this country. Luxembourg's GDP is fuelled more by the financial sector followed by ICT, logistics, bio-technologies, innovation and R&D. Thanks to new polizie these sectors have seen a remarkable development.The Netherlands is the seventh largest trading partner for Italy and the third largest country for GDP per capita in the Eurozone, representing an attractive market for companies. The countryi is in 24th place for ease of opening and managing a business. Among the goods most imported from Italy are pharmaceuticals, machinery, electrical appliances, crude oil and clothing, with an interesting growth in the import of products of the agro-food sector.In line with international trends, these countries are also very inclined to Italian tourism, especially in the Mezzogiorno. However, it is necessary to revisit the tourist products for the activation of a seasonal adjustment process linked mainly to the theme of food and wine and experiential tours.

Keywords: Tourism, Export, International Market.

1. L' internazionalizzazione delle imprese

L' internazionalizzazione è il processo attraverso il quale le imprese si aprono a nuovi mercati esteri, instaurando rapporti con altre aziende, consumatori e istituzioni operanti sui quei territori, allo scopo di vendere, produrre, acquistare materie prime o trovare nuove fonti di finanziamento.

Le decisioni a monte che portano ad intraprendere il processo di internazionalizzazione possono essere : mercato domestico saturo, nuove opportunità di guadagno, elevato carico fiscale

* Corresponding Author: abatemartina@libero.it

ed altri numerosi motivi. Ma aprirsi ai mercati esteri non è così facile come si possa pensare, bisogna che questa decisione non risulti fallimentare proprio per questo prima necessita un' analisi interna all' impresa per valutarne la solidità economica e finanziaria e poi successivamente andare a cercare il mercato obiettivo attraverso uno screening del mercato estero più adatto e predisposto al nostro prodotto. Nello screening si tiene conto in prima linea della dimensione del Paese, dei suoi indicatori economici (es: PIL procapite, distribuzione del reddito etc.) e dei suoi indicatori demografici (sviluppo demografico, numero di abitanti).

Le imprese italiane hanno una carta molto importante da poter giocare nel mercato internazionale: il *Made in Italy,* che non è solo un'indicazione geografica relativa al prodotto ma è ormai un vero e proprio brand che rappresenta eleganza, bellezza e genuinità. Il Made in Italy investe una moltitudine di settori dalla moda e cultura, al design, all' agroalimentare che rappresentano l'unicità e il fascino del saper fare italiano. In particolare le imprese del Sud Italia, grazie ai luoghi incontaminati, riescono a sviluppare dei prodotti alimentari unici apprezzati in tutto il mondo. A supporto di ciò anche uno studio di Made-in-Country-Index (MICI) e pubblicato da Forbes, il marchio Made in Italy è al 7° posto in termini di reputazione tra i consumatori mondiali, una posizione vantaggiosa che permette di penetrare un mercato molto più facilmente.

2. Analisi del Mercato Nord Europeo

Tra le varie aree internazionali in cui i prodotti italiani possono trovare un mercato favorevole spicca sicuramente il Nord Europa, in particolare l'Area del Benelux. Il Benelux è un accordo economico istituito in Europa, composto da Paesi Bassi, Belgio e Lussemburgo, il nome formato dalle iniziali dei paesi viene utilizzato non solo per riconoscere l'unione economica che si è venuta a creare, ma anche per la collocazione geografica di questi paesi nord-europei. Il trattato fu sottoscritto il 3 Febbraio 1958 a L'Aia, ma entrò in vigore solo nel 1960, lo scopo principale fu fornire un esempio importante per la nascita dell'attuale Unione Europea. Di questi tre paesi si parla sempre come un blocco unico in Europa, difatti si tratta dei tre paesi fondatori dell'Unione Europea. l rapporti tra Italia e questi Paesi sono del tutto positivi, in particolare con il Belgio per quanto riguarda gli scambi economici, sussistono volumi di interscambio notevoli che non solo si sono lasciati condizionare dalla crisi degli ultimi anni. Il Belgio resta per l'Italia un ottimo partner commerciale ed è uno dei principali mercati di sbocco per le esportazioni italiane. Il trend previsto per il prossimo biennio è sicuramente positivo, con un forte incremento nel 2021 (7,6%) e una progressiva stabilizzazione nel 2022 attorno ad un valore del 4,3%.[1]

Per rendere più comprensibile le dimensioni del Mercato Belga proveremo a dare alcuni numeri:

- Un reddito procapite di $46.600 , circa il 14% in più rispetto alla media Europea che corrisponde a $ 40.900, questo dato è di estrema rilevanza di in quanto il Belgio si posiziona al 35° posto nella graduatoria mondiale (l'Italia è al 50° posto).[2]
- Il Belgio è l'8° mercato di destinazione dell'export italiano [3]
- Il mercato belga conta una popolazione di oltre 11,5 milioni di persone di cui ben il 96% vive in aeree urbane

I prodotti italiani che vengono esportati in Belgio coinvolgono diversi settori, che occupano delle ingenti somme di mercato, come : prodotti chimici (oltre €5 miliardi), prodotti meccanici

[1] Dati ICE
[2] CIA.gov
[3] MISE

(circa €2 miliardi), mezzi di trasporto (€1 miliardo), metalli (poco meno di €1 miliardo), tessile e abbigliamento (quasi €1 miliardo), alimentare (circa € 900 milioni) e prodotti in legno e l'altra agricoltura (oltre € 500 milioni). Questi trend sono confermati da un' analisi ISTAT di Maggio 2022 dove si segnala che i prodotti alimentari italiani contribuiscono all' aumento dell' export con un +20,8 %.[4]

Inoltre, secondo una ricerca condotta da SACE[5] riportata dei dati nella tab.1, vengono messi in evidenza i dati rilevati da cui si può evidenziare i vantaggi di investire nel Belgio come il basso rischio di default.

Tab. 1. *Ricerca SACE- Indicatori relativi al Belgio*

RISCHIO PAESE

Il Belgio è collocato nella in classe A, ovvero tra i Paesi che hanno un'alta probabilità che nel medio-lungo termine onorino il servizio del debito estero, con una conseguente bassa probabilità di default.
Il Belgio è considerato un Paese con un basso indice di rischio.

RATING E BUSINESS CLIMATE

Indicatori di rischio	Ocse	Rating S&P'S	Rating Moody's	Rating Fitch
Rating	-	AA	Aa3	AA-

Indicatori di Business climate	
Indice Doing Business	52° su 190 Paesi
Corruzione percepita	16° su 180 Paesi
Competitività dell'economia	20° su 140 Paesi

Fonte: SACE

Fonte: SACE

Inoltre l' Italia conta una notevole presenza di italiani in Belgio: oggi è presente una comunità italiana ben radicata, infatti secondo le statistiche dell'AIRE nel 2007 vi sono residenti 235.673 italiani , questo dato diventa molto rilevante traducendo questi residenti in principali stakeholders dei prodotti provenienti dal Bel Paese . I dati analizzati infatti rivelano che il Mercato del Nord Europa rappresenta sicuramente un enorme potenziale per lo sviluppo dell' export dei prodotti italiani.

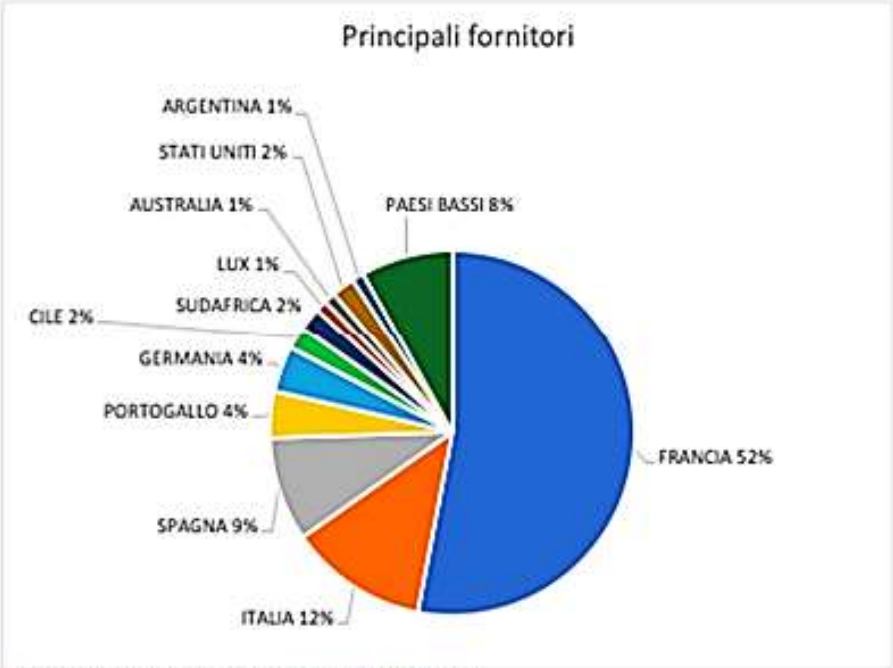
[4] Comunicato stampa Istat- Commercio con l'estero e prezzi all'import - maggio 2022
[5] SACE è la Società per azioni controllata da parte del Ministero dell'economia e delle finanze, specializzata nel settore assicurativo-finanziario. L'azienda è attiva nell'export credit, nell'assicurazione dei crediti, nella protezione degli investimenti, nelle garanzie finanziarie, nelle cauzioni e nel factoring.

3. Enogastronomia : la carta vincente dei prodotti italiani

L' Italia vanta una cultura enogastronomica tra le più interessanti al mondo, oggi il cibo non rappresenta solo un mero oggetto di consumo ma porta con se la storia, i profumi, le caratteristiche del posto in cui nasce. Le eccellenze italiane in questo settore sono molteplici, e sicuramente spicca il ruolo dell' export del beverage italiano.

3.1 Il mercato del Vino in Belgio

L'Italia è il secondo fornitore di vino per il Belgio, il primo importatore è la Francia con una fetta di mercato del 12%, riprova di ciò, lo Champagne rischia di perdere terreno rispetto al Cava, mentre il Prosecco sta conquistando quote di mercato crescenti.[6] Nel grafico seguente vengono messi in evidenza i principali fornitori del mercato belga.



Fonte: Agence pour le Commerce Extérieur

Esaminando i dati statistici in valore, segnaliamo che l'Italia è passata dal terza alla seconda posizione in termini di esportazioni dal 2019 al 2020, registrando un aumento del 13,3%. In valore assoluto il fatturato realizzato dall'Italia è stato di 115,2 milioni di euro, contro 101,7 milioni nel 2019. Il prezzo medio del prodotto italiano all'esportazione è circa 3 €/litro, vicino alla media del mercato che ruota intorno a 2,9 €/litro.

Per quanto riguarda il Belgio, nel corso degli anni '90, il consumo di vino è stato in costante aumento. Il consumatore belga ha iniziato a sostituire con il vino bevande come la birra e i superalcolici, che registrano cali ripetuti ed abbastanza rilevanti. In particolare, in Belgio vengono consumate quasi 400 milioni di bottiglie all'anno, ovvero 26 litri di vino in media procapite.

A tal proposito, il Covid-19 ha avuto un impatto sulle preferenze dei belgi relative ai formati di vino acquistati. Per il vino fermo, la maggior parte delle vendite è avvenuta con i formati Bag-in-box perché percepiti come più facili da consumare. Per il vino spumante, i produttori e i rivenditori hanno notato un aumento delle vendite di mezze bottiglie a causa delle restrizioni sugli incontri sociali, ma anche per via del numero crescente di famiglie monoparentali che ha

[6] ITA- Il Mercato del Vino, 2022.

contribuito all'aumento del consumo di bottiglie più piccole specialmente per il vino fermo. Mentre il consumatore medio mostra una netta preferenza per il vino rosso, il consumo dei bianchi è più elevato nelle Fiandre (42% del consumo totale). Secondo le previsioni, la domanda di vino biologico, sia frizzante sia fermo, e di vini bio continuerà ad essere in aumento.

In questo contesto i prodotti italiani come gli spumanti italiani è riuscito a recuperare il decremento del periodo 2011-2016 con un fatturato di 29,7 milioni di euro nel 2020, contro 27,8 nel 2019. Oltre all'Asti Spumante che nel 2020 ha registrato un aumento pari al 75% rispetto alle importazioni del 2019, la restante quota dei vini spumanti esportati dall'Italia è costituita da spumanti metodo Charmat (per l'Italia intendiamo il Prosecco) e da prodotti a bassa gradazione alcolica. Il segmento più importante dei vini italiani è costituito da vini rossi/rosati, con una ripartizione nettamente a favore dei vini DOC (25,02%).

Anche per i vini bianchi la ripartizione è più a favore dei vini con denominazione di origine controllata con 10,02% e l'8,55% per i vini da tavola[7]. È importante evidenziare che fino a qualche anni fa i prodotti italiani venivano non percepiti in modo positivo a causa della scarsa qualità dei primi prodotti giunti sul mercato ed alla distribuzione che avveniva tramite importatori non specializzati, tra i quali molti connazionali che distribuivano l'intera gamma dei prodotti agro-alimentari italiani. Negli ultimi anni la situazione si è ribaltata sia nella distribuzione che nell' immagine:

1. I vini italiani sono, sempre di più, distribuiti da importatori specializzati esclusivamente in vini ed alcolici, che conoscono meglio il prodotto, visitano le fiere per comporre il proprio assortimento e sono attivi a livello promozionale (degustazioni in presenza del produttore, partecipazione a manifestazioni fieristiche, siti internet con vendita diretta ecc.);
2. I vini di qualità sono maggiormente diffusi e presenti anche nella ristorazione belga e nella cucina italiana di alto livello, canale distributivo per eccellenza per una migliore conoscenza del prodotto da parte del consumatore.

3.2 Il turismo enogastronomico

Un' altro comparto legato alla tradizione del cibo è il turismo enogastronomico, che è stato riconosciuto dall' Organizzazione Mondiale del Turismo (UNWTO) come comparto del turismo culturale. A confermare l' importanza di questo settore è il boom dei viaggi in Italia nel 2021 tra gennaio e ottobre, prima tra le mete per la gastronomia, seguita da Francia e Giappone. È quanto emerge da una ricerca Ipsos [8]e dalle tendenze presentate da Google. La ricerca di un tour enogastronomico segna + 39% mentre quella relativa alle cantine segna un aumento del 30%. Tendenza confermata anche dai Social: su Instagram la pizza e la pasta spopolano diventando dei trend. Nell'organizzazione di una vacanza, la sostenibilità è considerata un valore importante dal 83% dei viaggiatori. In linea generale l'Italia è il paese più desiderato dal punto di vista turistico, secondo il 40% del campione intervistato da Ipsos. Dagli effetti più rilevanti spiccano la qualità della vita, seguita dall'ottimismo, della creatività e dalla capacità di inventiva che contraddistinguono gli italiani. L'offerta enogastronomica, la moda e l'arte sono considerati i principali ambasciatori della cultura all'estero. Arte ed enogastronomia rappresentano importanti strumenti per elevare la qualità del turismo, la sfida del prossimo futuro. Tutte queste caratteristiche rispecchiano i trend internazionali, in particolare i turisti del Nord Europa sono sempre più affascinati dal turismo enogastronomico a tal punto da essere un elemento determinante nella scelta della destinazione turistica. Sviluppando opportune strategie grazie alle sue caratteristiche, il Sud Italia potrebbe sempre di più rafforzare la sua immagine turistica.

[7] ITA- Il Mercato del Vino, 2022.
[8] Ipsos Group S.A. è una società multinazionale di ricerche di mercato e consulenza con sede a Parigi.

4. Le Fiere Internazionali

Le fiere turistiche sono uno dei principali strumenti di promozione nel settore turismo , che nonostante l'avvento della digitalizzazione hanno ancora importanza vitale in quanto risulta essere il luogo di scambio per gli attori coinvolti dove ci si può interfacciare. Le fiere vanno anche ad attirare un gran numero di partecipanti e visitatori, ed è molto interessante capire come le destinazioni selezionano le fiere. Da parte della destinazione ovviamente la scelta verte molto sul target di clienti a cui vuole rivolgersi, ripercorrendo le tappe che il cliente percorre quando sceglie una destinazione, che gli permetta di raggiungere la cosiddetta "customer satisfaction".

Nello stesso tempo anche le fiere fanno una selezione di quali destinazioni vogliono coinvolgere, attraverso un'attenta analisi di quali destinazioni sono più attrattive e tramite una pianificazione strategica che giovi sia al luogo in cui ha vita la Fiera, sia alle destinazioni che verranno scelte. Prendendo nello specifico il caso di VisitItaly, agenzia di promozione turistica partecipa a molte delle fiere Europee e mondiale con il fine di far conosce il Bel paese e tutte le strutture che sono presenti nel territorio, le destinazioni che partecipano tramite questa agenzia hanno la sicurezza di essere presentati da un brand con una posizione già affermata, e per i paesi che ancora non hanno preso parte ad alcune fiere Europee è un ottimo biglietto da visita, tra le più importanti in Europa ricordiamo:

- ITB Berlin, international tourism bourse di Berlino è considerata da ormai molti anni la più importante Fiera Turistica al mondo
- Salone internazionale svizzero delle vacanze, apprezzato in tutta Europa e soprattutto in Italia
- La F.re.e, fiera turistica a Monaco di Baviera
- Ferien-Messe Wie, la più importante fiera turistica in Austria
- La Feria de Madrid
- La Bit in Italia, a Milano nello specifico è la più grande esposizione al mondo del prodotto turistico Italiano.

Queste sono generalmente le fiere principali in Europa, in particolare per i paesi di riferimento Belgio, Olanda e Lussemburgo la fiera più importante è il Salon de Vacances. Ogni anno Bruxelles ospita il Salon Des Vacances, la fiera turistica più importante per i prodotti e la loro offerta turistica; questa fiera è una vetrina turistica che permette di far uscire dalla propria "comfort zone" un qualsiasi paese o regione, il contatto con una fiera di tali dimensione può aiutare a promuovere ed evidenziare un'offerta turistica. I belgi amano l'Italia, 7 su 10 sono stati in Italia per più o meno tempo, ma le città che vengono sempre prese in considerazione sono sempre le mete più famose, e ormai conosciute, per i belgi questa fiera rimane fondamentale per poter scegliere le proprie mete, e tra le preferenze che vengono segnalate dai belgi quella di avere un contatto il più diretto possibile con i locali. Proprio per questo è importante incrementare la presenza del Meridione alle fiere internazionali.

Conclusioni

L' Area del Nord Europea , in particolare il Belgio con Bruxelles capitale europea, vanta una forte presenza di diverse comunità internazionali e numerose attività congressuali connesse alle istituzioni europee, non solo va considerato come un paese di conoscitori, ma anche come un'importante "vetrina" aperta sia sul mercato locale, sia verso un pubblico internazionale con un potere d'acquisto elevato. Nei prossimi anni, il successo dei prodotti italiani, in particolare quelli provenienti dal Meridione dipenderà sia da una migliore conoscenza del prodotto da parte del consumatore e degli addetti alle vendite (sommelier, ristoratori, distributori ecc.) – con necessità, dunque, di azioni promozionali mirate -, sia dal livello qualitativo e, soprattutto, dal

rapporto qualità-prezzo del prodotto italiano importato. Ingenti sono da parte dei concorrenti gli investimenti in pubblicità effettuati sia sulla stampa generalista che su quella specializzata. In conclusione, le condizioni attuali sono favorevoli ad una maggiore penetrazione dei prodotti italiani nel Nord Europa, soprattutto per i prodotti della fascia media, venduti a prezzi che attualmente il consumatore è maggiormente disposto a pagare. Viceversa questo interesse per i prodotti italiani può essere un traino per portare i turisti del Nord Europa nel Sud Italia, in una cornice pronta ad accoglierli tra buon cibo, cultura e panorami mozzafiato. Generando ingenti flussi di denaro che permetterebbero alle imprese turistiche, e non solo, di investire nella loro espansione e nel consolidamento della loro immagine, in modo da allinearsi sempre di più alle tendenze internazionali e di conquistare nuovi mercati.

Riferimenti

-CIA (2022) " The World Factbook", https://www.cia.gov/theworldfactbook/countries/belgium/#economy

- IPSOS (2021) https://www.ipsos.com/it-it/knowledge/overview

-ITA (2022)- Il Mercato del Vino

-ISTAT- COMUNICATO STAMPA - COMMERCIO CON L'ESTERO E PREZZI ALL'IMPORT - MAGGIO 2022

-MISE (2022) https://www.mise.gov.it/index.php/it/

- SACE (2022) https://www.sace.it/mappe/dettaglio/belgio

-Visit Italy- Agenzia di Promozione turistica , https://www.visititaly.ch/categoria/prodotti-e-servizi/fiere-turistiche

ISBN: 978-2-931089-30-9

The figure of the pre-trial judge, his constitutionality and his role as a guarantor of the investigative process

Saimir FEKOLLI*
Dr, Tirana - Albania

Francesk GANAJ
Msc, Tirana - Albania

Ernald BELISHTA
Msc, Tirana - Albania

Abstract: The amendments to the Code of Criminal Procedure in the Republic of Albania, entered into force in August 2017, brought a new procedural regime related to the figure of the pre-trial judge as a procedural subject with active investigative powers and guarantor of due process. The paper will aim to highlight the meaning and role of the pre-trial judge, the constitutional profiles related to the concept of 'natural' judge and the validity of this figure in relation to the constitutional context. Also, the paper will focus on the analysis of procedural powers, its relationship with the prosecutor as a subject who 'exercises criminal prosecution' as well as with the judge of the foundation regarding the 'charges sent for trial'. Also, the paper will focus on the test that the pre-trial judge uses for the meaning of the term 'sufficient evidence to support the charge', his role in dismissing the charge or case, accompanied by some comparative profiles and the unconsolidated jurisprudence of the Panel. Criminal Court of the High Court in the Republic of Albania.

The paper, issues and sub-issues addressed, are important for law practitioners, judges, prosecutors, lawyers, researchers, etc., not only as a guide in terms of understanding the procedural norms related to the figure of the pre-trial judge but also for him fostered discussions that go beyond the 'courtroom' as the place where criminal procedural norms take on 'life'. The methodology used in the paper is the qualitative one, through which some findings have been drawn such as' unconstitutionality premises of the figure of the pre-trial judge, the test of sufficient evidence to send the case for trial is different from the test of reasonable doubt based on evidence and beyond any doubt of reason and; dismissal of the case in the preliminary hearing is done for the cases when the accusation is openly unfounded in evidence and when the evidence presented by the prosecutor does not offer success for adversarial in the trial of the case on the merits'.

In conclusion, it is evident that the figure of the pre-hearing judge is presented with problems in the constitutional profile, creating premises for an irregular legal process. The preliminary hearing has three main functions: filtering the case, guaranteeing the defendant, additional investigative phase. In this regard, at the preliminary hearing the court verifies (i) whether the charge is unfounded, whether there is sufficient evidence to support the charge, (iii) whether there is invalidity or unusability of evidence, (iv) whether further investigation is needed, (v) whether the trial on the merits will take place with the ordinary trial procedure or special trials, which may be required at this stage. In the recommendations, the competent bodies will be oriented to place the pre-hearing judge on the constitutional ground, as well as to improve the current norms for a fair implementation. Recommendations also consist of understanding and applying procedural norms of interest to law scholars.

Keywords: Constitutionality, preliminary hearing; sufficient evidence; beyond any reasonable doubt.

* Corresponding Author: saimirfekolli@hotmail.com

1. Introduction to the figure of the judge of the preliminary session

The Code of Criminal Procedure in the Republic of Albania has constantly been the subject of changes due to the will of the Assembly as a positive legislator (norm creator) but also due to the interventions that the Constitutional Court has made through ascertaining the criminal procedural norms "with constitutional vices" with result in their abolition (negative legislature). In the following, the Albanian State, due to the obligations arising from the accession to international organizations, especially the accession to the European Union in 2016 after many years of work, consultations, etc., adopted the legal package with 26 laws (known as legal reforms) among which and in a special way, the Constitution of the Republic of Albania and the Code of Criminal Procedure were also affected.

In contrast to the previous legal regime, which provided for only two judges in the criminal process, that of preliminary investigations that controlled the activity of the Prosecution body in the preliminary investigation phase, a necessary figure since in the absence of contradictions in the investigation phase, the judge appeared as guarantor of basic human rights and freedoms, subjects involved or affected by the investigative activity (eg: approved wiretapping, red-handed arrests, assessed requests for personal or property security measures). His role was controlling and not active in investigative activity, a constitutional position which traditionally distinguished him from the judge of the preliminary investigation (or of the preliminary investigations) who has active powers in directing investigations. The second figure was 'of the judge of the foundation' which in contradiction, and on the basis of the principle of presumption of innocence, assessed the basis of the accusations raised by the Prosecutor through his exercise of criminal prosecution, competence which extended to the assessment of the guilt of the defendant and the legal definition of the facts committed by the Prosecutor through the exercise of accusation/criminal prosecution. This procedural system was considered inefficient by the drafters of the reform, and the creation of the figure of the judge of the preliminary session was seen as a necessity. It should be noted that no scientific study has been developed by the drafters why the previous system was not efficient. For the first time, the concept of the judge of the preliminary hearing was formalized through Article 332 of the Code of Criminal Procedure, and it is also distributed in other procedural provisions depending on the stage and the rite of trial.

2. The role of the judge of the preliminary session and his decision-making powers.

The preliminary session is a phase of the criminal process that takes place before the judge of the preliminary session in the counseling room, with the necessary presence of the prosecutor and the defense of the defendant. This is a new phase for the Albanian criminal procedural system provided by articles 332/a-332/gj of the Code of Criminal Procedure. The preliminary hearing, by its very name, is not a final stage of the process by which the guilt or innocence of the accused is determined. This decision-making belongs to the judge of the foundation. Traditionally, the trial in the preliminary session is characterized by a very simple process, which does not consist of a debate phase, but a necessary passage to verify the correct exercise of the charge by the Prosecutor. From the systematic analysis and interpretation of the procedural norms, it results that; the preliminary hearing has three main functions: filtering the case, procedural guarantees for the defendant and the possibility of choosing the trial procedure on the merits. First, the preliminary hearing is a "filtering" phase of the case. In this hearing, it is verified whether the accusation is obviously unfounded. The judge verifies whether the right to file charges has been correctly exercised. If the charge is clearly unsupported, the judge decides to dismiss the case or the charge. If it is deemed that further investigations are necessary, the

judge orders the conduct of investigations, determining, when possible, their direction and the evidence to be obtained by the prosecuting body. Thus it is intended to avoid processes in the foundation phase, which could be closed in a previous phase. Second, the preliminary hearing serves as a guarantee for the defendant. If there is insufficient evidence to support the charge or if one of the cases provided for by Article 328 of the Code of Criminal Procedure exists, the judge decides to dismiss the case or charge. Thirdly, the preliminary hearing serves as an opportunity to choose the rite of trial on the merits. During the examination of the case at this stage, the application of two of the four rites of special trial defined by the Code of Criminal Procedure may be requested. Article 332/c of the Code of Criminal Procedure stipulates that at this stage a summary trial may be requested or an agreement to plead guilty and impose a sentence may be presented.

The preliminary hearing can also be turned into an additional (supplementary) and final investigative phase. When the judge deems that further investigations should be carried out, he suspends the trial and returns the documents to the prosecutor to complete the investigations. This right of the judge of the preliminary session is defined in Article 332/ç of the Criminal Code. Criminal, where it is expressly provided: "When it deems that the preliminary investigations are not complete, the court orders their completion, determining the direction and, when appropriate, the acts that must be performed. When it finds invalid acts or unusable evidence, the court declares them by decision and, when possible, orders their repetition. The court sets the deadline within which the investigations must be completed and the date of the new session". Completion of investigations can be requested by the court not only in relation to the prosecution body, but also in relation to the defense, when it has presented evidence of its innocence, which are not in accordance with the procedural norms or are incomplete. But while for the prosecution the decision of the court to complete the investigations, determining the actions that must be carried out nominally constitutes an obligation, for the defense party it is simply an orientation. For the defense party this is only a right and not an obligation, as a different interpretation would contradict the principle of presumption of innocence.

The intervention of the judge at this stage is presumed not to infringe the right of the prosecution to exercise criminal prosecution and bring charges in court on behalf of the state. The exercise of criminal prosecution by the prosecution is not only a right, but also its duty (as such is the exercise of competence). The public interest requires that criminal behavior be detected and its perpetrators punished. The ratio legis of articles 329 and 329/c is the guarantee of full investigations. These provisions are in accordance with the principle of mandatory criminal prosecution embodied in Article 148 of the Constitution of Albania, since having the right to request the completion of investigations, the judge avoids dismissing the case, due to circumstances related to the carelessness of the prosecution. In the preliminary hearing, the court verifies whether the charge is unfounded, whether there is sufficient evidence to support the charge, whether there is invalidity or unusability of evidence, whether there is a need for other additional investigations, whether the trial of the merits will take place with the ordinary trial procedure or special judgments, which may be required at this stage.

Referring to procedural norms 333, the judge of the preliminary hearing can decide to dismiss the charge or the case when he assesses that the data administered in the investigation phase and on which the prosecutor relied in the exercise of the criminal prosecution, are insufficient. In the judicial practice, the courts of fact (the court of first instance but also the appeals) have had problems regarding the meaning of this competence, the limits of the judge of the preliminary session in terms of dismissing the case and the test of admissibility. Often, the Judge of the preliminary session, although he exercised his judicial activity not on the adversarial basis, since the judicial debate belongs to the judgment of the case on the merits by another judicial body, decided to dismiss the case or accusation on the grounds that "it is not proven that the criminal offense has been committed from' or is not proven beyond reasonable doubt.

After 5 years from the entry into force of the Code of Criminal Procedure, the first cases for examination in the Supreme Court were recorded. With decision No. 81, dated 08.03.2022, the Criminal Panel of this Court considered the criminal case on the recourse of the Vlora Appeals Prosecutor against the decision of the judge of the preliminary hearing at the Court of First Instance of ..... *At the end of the investigation of this criminal proceeding, in relation to the defendant A.Q, as well as from the evaluation of the evidence administered during the investigation carried out on behalf of these citizens, the court finds the reasoning of the prosecution to be unsupported by the facts and evidence,* ***as it turns out that the collected evidence does not exceed reasonable doubt, in such a way that everyone in their unity charges the defendant Andon Qirko with criminal responsibility for committing the criminal offense of "Production and sale of narcotics", provided by article 283/2 of the Criminal Code .***

This decision was found in the wrong application of the procedural law by the Supreme Court, which states that... *"The panel assesses that in this particular case, the decision-making of the courts of fact exceeds the functional competence of the judge of the preliminary session. The duty of the judge of the preliminary hearing is to limit himself to verifying, in the presence of the source of the evidence that is presented to him, whether in the situation in which the acts are located, the case can be passed to trial, without making essential evaluations that belong to the trial phase. The assessment of the judge of the preliminary session cannot be separated from that of the described criminal facts. In cases of the non-existence of the criminal fact, the absence of the criminal offense if the facts are clear from the acts and there is no need for further investigations, the judge of the preliminary session that occurred before such a case, must decide to suspend the trial. The judge of the preliminary hearing cannot make a deeper assessment than that required for the preliminary hearing, and cannot go into the matter of evaluating the evidence and valuing it in the sense of being proven, an assessment that is made in contradiction to judicial debate that is characteristic of the judgment on the basis of the case. In the case of recourse under review, the two courts have exceeded the goals of assessment and competence that the procedural law recognized by not correctly interpreting articles 332/dh/1 letter ç) of the CPC in relation to paragraph 1 of article 328 of this Code.*

The judge of the pre-trial hearing can dismiss the charge when it becomes clear that the fact does not exist or when from the point of view of the control of the investigations on his part it results that the prosecutor who requests the sending of the case to trial has not brought evidence related to the defendant, making a relevant count of the evidence, or the evidence he has brought are not such that in relation to this defendant in the further trial, they provide any information about facts object of accusation regarding this person. The judge of the preliminary hearing cannot evaluate the evidence, its value in relation to the fact or guilt or its value in relation to other evidence, as this can only be done in the court session of the trial of the merits of the case under the conditions of adversarial judicial debate. The review procedure in the preliminary session does not replace the judgment of the case on the merits. Based on this purpose, the legislator in article 332/dh point 3 of the Code of Criminal Procedure has provided that: "*The review procedure in the preliminary session does not replace the trial of the case on the merits nor does it prejudge its final decision".* In conclusion, the Criminal Board states that the judge of the preliminary session, referring to article 328, point 1, letter "dh" of the Criminal Code, can decide to dismiss the case only when prima facie it appears that the defendant did not commit the criminal offense or it is not proven that he he has committed, while in the case where the judge of the preliminary session evaluates the evidence "beyond any reasonable doubt", then he takes the powers of the court that will examine the case on the merits, contrary to the procedural provisions that regulate the role of the judge of the session preliminary.

Based on the analysis carried out by the Criminal College of the Supreme Court, it turns out that the Trial in the preliminary session is not a trial on the merits (foundation), but a trial on the rite (phase of the preliminary session). *This means that the judge of the preliminary session*

cannot express the guilt or innocence of the accused ***(the test he uses and applies is not the principle beyond any reasonable doubt but the test of the sufficiency of the evidence)*** *but about the impossibility of supporting the accusation in the trial . "Sufficient evidence" does not mean the number of investigative actions carried out, but how many of these investigative actions yielded data that prove the accusation against the suspect.* In the assessment of 'sufficient evidence', the judge of the preliminary session must manifest a probability belief, and not a complete belief that the criminal offense has been committed. *This conviction must have a high degree of reasonable probability that the person investigated has committed the criminal offense, and that the degree of certainty 'beyond any reasonable doubt' be verified at the trial stage during the adversarial debate in the judicial review.*[1] *In this regard, the main competence of the preliminary judge is the verification of the evidentiary material of the prosecution body against the suspect and the verification of the data, when the latter meet the minimum necessary conditions for the filing and trial of the charge against him. In this context, the judge decides to accept the request for leave or not to accept the prosecutor's request to send the case to trial, when the evidence of the prosecution body does not give any indication of the guilt of the suspect or the accused".*[2]

The insufficiency of the data to support the filing of an accusation, which formed the Prosecutor's request for dismissal, should be seen in the procedural plan and not in that of the foundation, that is, the prosecutor's request for the dismissal of the case should be accepted in cases where the data of administered in the investigation is unstable due to the little supporting data that may result from the dynamics of the investigation and the objective inability of the prosecution body to collect them, and not from the view that the data in charge of the person under investigation does not prove the guilt of his. So the evaluation of the evidence for the transfer of the charge to the trial/or the return of the acts for communication of the charge is not based on the guilt or innocence of the accused/suspect, but on the ability or inability to support the charge in the trial. The judge of the preliminary session decides to dismiss the charge mainly or at the request of the Prosecutor only in those cases when the data referring to the subject under investigation are unstable and the filing of a charge does not offer success in the trial of the merits.

3. Constitutionality of the judge of the preliminary session.

The creation of the judge of the preliminary session also brought a new conception of the Prosecutor's Office in terms of its powers. Before the changes of 2016, the Prosecutor had strong decision-making powers expressed in his right/obligation (competence) to decide to dismiss the criminal case at the end of the preliminary investigations. His competence to decide the suspension of the criminal case is often conceived as 'giving justice' reasons for which constitutional subjects have sent for incidental control to the Constitutional Court of the Republic of Albania for the latter to express on the constitutionality of the Prosecutor's competence for the suspension of criminal proceedings or charges.

In decision no. 43 dated 26.06.2015, the Constitutional Court reasons that: "With regard to Article 148/1 of the Constitution, the function of the Prosecution body, as a representative of

[1] This position is also maintained in Decision no. 554/14, dated 10.02.2015 of the Court of Appeal of Kosovo. Paragraph .45. If the case goes to trial, then the full evaluation of the evidence and the verification of the factual situation is the task of the trial body. The College concludes, therefore, that it is not necessary to carry out such an assessment in order to prove the existence of well-founded suspicion. As stated above, there is no need for a detailed assessment, nor is it possible to do such a thing at this stage of the procedure, and it is up to the trial panel to do it during the judicial review.

[2] Decision of the Court of Cassation of Italy, Sentence no. 41162/2014 as well as the Decision of the Court of Cassation of Italy, Sentence no. 8831, dated 14.11.2003; Decision of the Court of Cassation of Italy, Sentence no. 10849/2012.

the prosecution on behalf of the state, means that this body has the exclusive right to decides whether or not to prosecute, i.e. whether or not to bring a case to trial, dismiss or not a case at the trial stage. Regarding this body, the Court has assessed that it has several features, which are defined in the Constitution and in the law and which place this body in a distinct position from other powers, and especially: a) as the only body in the country carries out criminal prosecution; b) as the body that represents the accusation in the court on behalf of the state, that disposes of the issues that are in the trial and that is free in seeking the type and measure of punishment against the persons found guilty; c) as a body with complete independence in the exercise of its functions, subject only to the Constitution and laws, which means that the initiation of criminal proceedings, bringing before criminal liability, dismissal, suspension of cases or sending to court are attributes of the Prosecution ". Through this decision, the Constitutional Court makes a detailed analysis of the constitutional position of the Prosecutor, especially of Article 148/1 of the Constitution, a norm which provides that the Prosecutor's Office carries out the criminal prosecution and represents the accusation on behalf of the state, a norm on which the competence is also conceived him to decide the suspension of the case.

The amendments of the Criminal Code, stripping the Prosecutor of the power to dismiss (for crimes as for misdemeanors the prosecutor loses the power to dismiss the case) without changing the Constitution, were attacked by the Association of Prosecutors on the grounds that the Code of Criminal Procedure has violated the hierarchy of acts (Article 116 of the Constitution) as it 'takes away the powers' which the constitution has guaranteed and which, in particular, decision no. 43 dated 26.06.2015 of the Constitutional Court recognized. The Constitutional Court did not come out with a decision as the constitutional college was divided 4 to 4 (votes) in favor of the Association's request, not meeting the necessary majority for decision-making. We are of the opinion that the amendments to the Code of Criminal Procedure, by removing the Prosecutor's competence to decide on the dismissal of the charge or the case without changing the constitutional norms which have recognized this competence, have violated the principle of the constitutional independence of the Prosecutor's Office. Also, the competence of the judge of the preliminary session, to order the Prosecutor to file charges in the conditions where the latter has filed the request for the dismissal of the case or charge, violates the role of the prosecutor and his essential competence, which is "exercising criminal prosecution". The exercise of criminal prosecution is the main function of the Prosecutor's Office and consequently also of the prosecutors. Upon receiving notification of a criminal offense, the judicial police without delay refers it to the prosecutor. The latter conducts the necessary investigations related to the exercise of criminal prosecution, but within certain powers. **So, the exercise of criminal prosecution is the center around which a series of activities take place, this function is also related to the realization of other functions.**

The Constitutional Court in decision no. 5 dated 06.03.2009 reiterates its position that criminal prosecution, in the sense of Article 148 of the Constitution, is an exclusive function of the prosecution. In this decision, she reasons that: "It is up to this body, based on the Constitution and according to the cases defined in the Criminal Procedure Code, to file a public accusation when it is before the commission of a criminal offense provided for as such by the Criminal Code. The general principle is that the prosecution has the right to start the preliminary investigation, which is a process that contains several elements such as: calling witnesses and experts, taking evidence, checking the apartment or person, etc. The constitutional obligation is for the prosecution to be carried out by the prosecutor's office, and on the basis of this obligation, the entire CPC is built, which provides in detail, in the chapter on the prosecutor's office, the duty of this body during criminal proceedings, distinguishing it from the courts or other bodies participating in criminal trial. The prosecution, if there is evidence, initiates criminal prosecution against the person suspected as the author of the crime. This is also known differently as the principle of legality, where the activity of the prosecution must be constantly

supported. ***Opposite this principle stands the one of opportunity, according to which it is up to the prosecutor himself to decide which cases he should investigate and according to which sequence or priority".***

The function of the prosecution body - as a representative of the prosecution on behalf of the state (Article 148/1 of the Constitution), ***means that this body has the exclusive right to decide whether or not to prosecute, i.e., whether or not to prosecute a case in court, to dismiss or not a case at the trial stage.*** *The Constitutional Court in decision no. 14 dated 21.07.2008 assesses that: "... when regulating relations in the criminal procedural sphere, the legislator enjoys wide freedom of action, but respecting the norms and principles of the Constitution that relate to the equality of persons in rights (Article 18 of the Constitution), the right to go to court and the right to a due process of law (Article 42 of the Constitution), the principle of independence of the court in delivering justice, etc. When undertaking regulations of this nature, the legislator, in addition to the above-mentioned principles, must also respect the constitutional framework that sanctions the institutes of criminal prosecution, defense of the accusation on behalf of the state and trial". As a result, we are of the opinion that the legislator in the adjustments he made to criminal legal-procedural relations did not respect the institute of criminal prosecution and representation of the accusation in court on behalf of the state.*

Another problem encountered with the amendments to the Criminal Code is the relationship that is created between the court's order for the formulation of charges and the examination of the Prosecutor's request for the case to go to trial based on an accusation that the prosecutor has exercised after the court order. According to the Penal Code, in the preliminary session the defendant can request the application of a summary trial and if the judge of the preliminary session assesses that the case is resolved in the state of the acts, he accepts it and judges the case on its merits without passing it on to another judge.[3] So the legal changes have conceived a mixed figure between the judge of the preliminary session and the judge of the foundation. We estimate that this legal change did not take into consideration the principles of the regular legal process, part of which is the "judgment by an independent and impartial court". We are of the opinion that the competence of the judge of the preliminary session to proceed with a trial on the merits after accepting the request for a summary trial is partially contrary to the constitutional norms and concretely violated the principle of independence and impartiality of the court. This incompatibility is created in the eventuality when the Court has ordered the formulation of the charge and then the same court, after the prosecutor's request for the case to go to trial, decides on the defendant's guilt. Procedural norms do not guarantee the elements of the regular process, especially in terms of the principle of presumption of innocence according to which "the court must start the process with the conviction that the defendant is innocent". In other words, with this legal provision "the defendant is judged by a court which has ordered that charges be brought against him". *The judgment by the same court that ordered the charge forms the premise that 'the court starts the process with the conviction that the defendant is guilty'.*

4. Conclusions and recommendations.

1. The changes to the Code of Criminal Procedure in the "introduction" of the judge of the preliminary session are partially contrary to the constitutional norms. The 'mandatory' powers, such as the Prosecutor's order to formulate charges, contradict the principle of legality in the exercise of criminal prosecution, since the changes were made without changing the constitutional norms. As a result, the legislator violated the principles related to the "hierarchy of acts".

[3] See decision no. 26, dated 04.12.2006 of the Constitutional Court

2. Secondly, it turns out that he can hypothetically order the formulation of the charge and further on the charge formulated by the Prosecutor to file a request for the case to go to trial, a request for summary judgment is presented by the defendant and the court (the one that ordered the formulation of the charge) to proceed with the judgment of the case on the merits and to decide on the guilt or innocence of the defendant. This legal regulation has not correctly evaluated the principles related to the impartiality of the court, part of which is "the judge must proceed with the trial, presuming that the defendant is innocent". In this case, the judge is not in a constitutional position due to the legal provision as he has expressed an opinion on the case by ordering the formulation of the charge. In summary, this legal provision creates the premise that "the trial is carried out by the one who ordered the filing of the charge".
3. Thirdly, based on the "evidence elements" provided by the Prosecutor in the preliminary session, the judge in the preliminary session can decide to dismiss the criminal case "if the accusation is clearly unsupported" and that the evidence analyzed in the preliminary session does not provide a probability of guilt . During the trial in the preliminary session, evaluation criteria of the evidence cannot be used, since the latter belong to the trial on the merits. He (GJ.S.P) is limited to the sufficiency of the evidence which, according to a legal logic, guarantees contradictions in the trial of the case on the merits and that from their evaluation strong doubts arise on the involvement of the defendant in the criminal offense, such that they exceed the standard of requested for the assignment of personal insurance measures.
4. In the following, it is estimated to give some conclusions, which should be addressed in legal changes, but not only. The legislator should intervene in the competence of the judge of the preliminary session, canceling his competence to formulate charges, as it violates the principle of exercising criminal prosecution, the exclusive attribute of criminal prosecution bodies, the Prosecutor's Office. Likewise, if it is estimated that "the competence of the judge of the preliminary session does not violate the principle of the exercise of criminal prosecution" at least the judge who orders the formulation of charges should be distinguished from the one who judges the case on the merits with a shortened trial procedure since the principle of impartiality is violated and in entire legal process.

References

1. Decision No. 3, dated 06.02.2008 of the Constitutional Court in the Republic of Albania.
2. Decision no. 26, dated 04.12.2006 of the Constitutional Court in the Republic of Albania.
3. Decision No. 81 dated 08.03.2022 of the Criminal College of the Supreme Court in the Republic of Albania.
4. Decision no. 554/14, dated 10.02.2015 of the Court of Appeal of Kosovo.
5. Decision of the Court of Cassation of Italy, Sentence no. 33763/2015.
6. Decision of the Court of Cassation of Italy, Sentence no. 41162/2014.
7. Decision of the Court of Cassation of Italy, Sentence no. 10849/2012.
8. Decision of the Court of Cassation of Italy, Sentence no. 8831, dated 14.11.2003.

ISBN: 978-2-931089-30-9

Summary

Iris Cekani, Francesco D. d'Ovidio, Francesco Favia, Pietro Iaquinta
Introduction and Information 5

Adriana Buzdugan
Ecotourism development strategies in terms of eco-brand clusters 9

Veronica Bulat
Principles of Sustainability Applied in the Hotel Industry from Republic of Moldova 17

Maria Hămuraru
Synergic Aspects Regarding the Development of Educational Tourism in the Republic of Moldova... 23

Irina Calugareanu
Infrastructure's Projects Risk Management Evaluation Within the Public-Private Partnership in the Republic of Moldova 31

Natalia Antoci
The impact of globalization on tourism in the Republic of Moldova 39

Mariana Stoica
Les perspectives du tourisme ecologique dans la Republique de Moldova 45

Francesco Favia
Sostenibilità del turismo di genere. Dalle motivazioni storiche del Tour ai nuovi modelli di acquisto . 51

Giovanni Tocci
Scenari turistici dopo il Covid. La riscoperta del turismo lento 61

Giovanni Tocci
Percorsi di Turismo verde e sostenibile. L'esperienza dell'Ambito Territoriale "Terre di Siena" 67

Elisa Gallo, *Antonella Perri*, *Tullio Romita*
Thoughts and reflections on youth tourism 75

Giovanna Dodaro
Enhancement of the combination of music and culture 85

Ornella Carlino
I festival cinematografici in Italia e il loro legame con il territorio 91

Paola Pieragostini
Il Nuovo Umanesimo in Italia espresso dai cantautori contemporanei, veicolo di turismo dell'etica culturale come identità sociale da condividere 95

Khalil Salem
Spiritual Tourism, a Development Factor for Local Saharan Tourism 99

Domenico Antonio Barbuto
Viaggio Gustoso. Spunti di riflessione sul turismo gastronomico 105

Majlinda Lici Koci
The food, cuisine and gastronomy, an important aspect of tourism in Albania 113

Maria Giovanna Onorati, *Francesco Domenico d'Ovidio*, *Elena Horská*
Sustainable Eating in Times of Crisis: between locavorism, ecologism, and safetyism 121

Federico De Andreis, *Ubaldo Comite*, *Davide Marchisio*
Internationalization strategies: an overview on the promotion of Made in Italy wine in the Chinese market 131

Massimiliano Mangafà
Rye as a Valid Alternative to Wheat, Corn and Rice in Human Food 141

Paolo Snidero
Food crisis: REPowerEU toolbox in Energy Efficiency Technologies for sustainable food processing 147

Matteo Lupoli, *Tommaso Rimondi*
L'ecoturismo nelle aree interne come proposta anticrisi 157

Alfredo Ernesto Di Noia, *Giulio Mario Cappelletti*, *Carlo Russo*
The certification schemes related to the sustainability. The case of Italian National Parks 163

Maria Pompò
Il debito pubblico è compatibile con la sostenibilità ambientale? 171

Orkida Ilollari, *Ines Kociaj*
Lessons learned from the Covid-19 according to the bank's regulations by Basel Committee 181

Giovanna Mastrodonato
Il Piano per la transizione ecologica: verso un nuovo approccio culturale ai temi della sostenibilità . 189

Giovanna Crocco
PNRR and Sustainability: The Environmental and Energy Transition 199

Antonella Reitano, *Pietro Squilla*, *Marco Fazio*
La sostenibilità della produzione della fibra di ginestra 209

Domenico Albano, *Antonio Dominianni*
Monitoring and production of a plant of earthworm composting for the treatment of organic waste . 219

Giovanni Tarantino
Riflessioni sulla "giustizia climatica", tra etica e diritto 227

Enida Bozheku
L'élite intellettuale, culturale ed artistica nel processo di democratizzazione dell'Albania del XXI secolo 233

Maurizio Cardanobile, *Paola De Santis*
The Principle of Non-Refoulement Under International Human Rights Law..... 243

Aurora Picone
Processo penale e processo tributario: la disciplina dei travasi..... 251

Giulia Metallo, *Pietro Iaquinta*
How does the right to travel change following the Russian-Ukrainian conflict: repercussions on Italian tourism?..... 259

Enkelejda Koka
The Italian and Maltese 'Closed Port' Policy to Irregular Migrants by Sea: Discriminated and Stranded-off at Sea in Violation of International Human Rights Law..... 269

Paola Folino, *Annamaria Curcio*, *Raffaella Camastra*
Ukraine emergency: reception in Italy of citizens fleeing war through the Institute of Temporary International Protection..... 277

Eveny Ciurleo, *Ilaria Zafferano*
Irregular immigration and Depopulation: a solution to repopulate the "Ghost Towns" 287

Eftiola Pojani
Population approach towards Covid-19 vaccination: the Albanian experience..... 293

Silvi Bozo, *Irsida Mehmeti*
Community Pharmacists' Impact on Public Awareness During the Covid-19 Crisis in Albania 299

Arta Jashari Goga
The relationship between flexible rewards and subjective performance..... 305

Eleonora De Luca
Digital Transformation: The Importance of Change..... 315

Raffaella Girone
Digital and ecological transition: the two sides of the same coin. A brief overview. 323

Maria Antonietta Sposato, *Edith Macri*, *Antonio D'Orrico*
Energy development in the South: an opportunity in times of energy crisis..... 333

Special Panel FeNCo

The role of diplomats in supporting people on a journey, promoting environmental protection and the development of territories and food cultures..... 343

Gianvico Camisasca
Presentation of Fe.N.Co. and its initiatives at Italian and international level 345

Gennaro FAMIGLIETTI
Culture in all its forms as economic, social and international dialogue promotion. The case of the Institute of Southern Culture of Naples..... 347

Giorgio Franco ALETTI
Considerations about Memorandum of Understanding between International Trade Centre and Fe.N.Co. 349

Emanuele BETTINI
The Mediterranean is a crossroads of civilization, religions and cultures 351

Last run from the Past

Papers from some previous UNICART Conferences, received too late to appear in their own Proceedings Books *355*

Armelina Lila (Fushekati)
Informal Economy in the time of COVID-19! (Case Study: Albania)..... 357

Federico De Andreis, *Ubaldo Comite*, *Federico Maria Sottoriva*
Human resource management as a competitive advantage instrument in tourism and hospitality 369

Manuela MECE, *Etleva MUÇA (DASHI)*
Consumers' willingness to use the smart tourism technology..... 377

Giulia Furfaro, *Peppino De Rose*
The food industry in southern Italy as part of tourism development..... 383

Enkelejda Hamzaj, *Qamile Caca*
The role of public relations and services delivery in public institutions 389

Peppino De Rose, *Martina Abate*
Northern Europe Market Opportunities for Southern Italian Enterprises..... 395

Saimir Fekolli, *Francesk Ganaj*, *Ernald Belishta*
The figure of the pre-trial judge, his constitutionality and his role as a guarantor of the investigative process 403

ISBN: 978-2-931089-30-9

Avenue du CASTEL 87, 1200 BRUXELLES (Belgium)

D/2022/15070/09

7th UNICART INTERNATIONAL CONFERENCE Proceedings Book

© Copyright 2022 - *International Academic Research Center Str.*

UNICART

INTERNATIONAL CONFERENCE
ACADEMIC RESEARCH & TOURISM

The 7th UNICART International Conference, last meeting in 2022, was supposed to take place in the charming capital of the Republic of Moldova, Chișinău, at the State University… but once again adverse circumstances frustrated our plans.

Unfortunately, there are still no signs of a possible end to the war in Ukraine, and for this reason its harmful effects will last for a long time and a project for the sustainability of the creation and management of the most essential food resources will even be launched.

Tourism is also facing new crises and has to change its guidelines once again. And the dynamics of economic development open up new scenarios, not all of which are positive.

As can be found in the works presented in this book, in chronological order of arrival, there are many food for thought for new and more in-depth research, because cultural and academic dynamics are also marking time.

UNICART sets increasingly ambitious goals. The intent is to increasingly break down the barriers to the circulation of ideas, cultural programs and research, always reminding us that ideas move upright and therefore together with people across nations.

UNICART is giving life to a dream that can come true by giving life to an organization that wants to be a great university where prestigious professors from various universities around the world create a single international pole of knowledge. The places of teaching will no longer be just university classrooms, but also open spaces, museums, cultural centres, workplaces, student residences, cyber-cafes.

The official presentation of our projects will take place during the 2nd ***UNICARTourism*** on 22 and 23 April 2023 in Tirana (AL), where we are waiting for you for a Live Conference.

15,00 Euro

ISBN 978-2-931089-30-9